eDocument Expert

User Guide

Version 1.2

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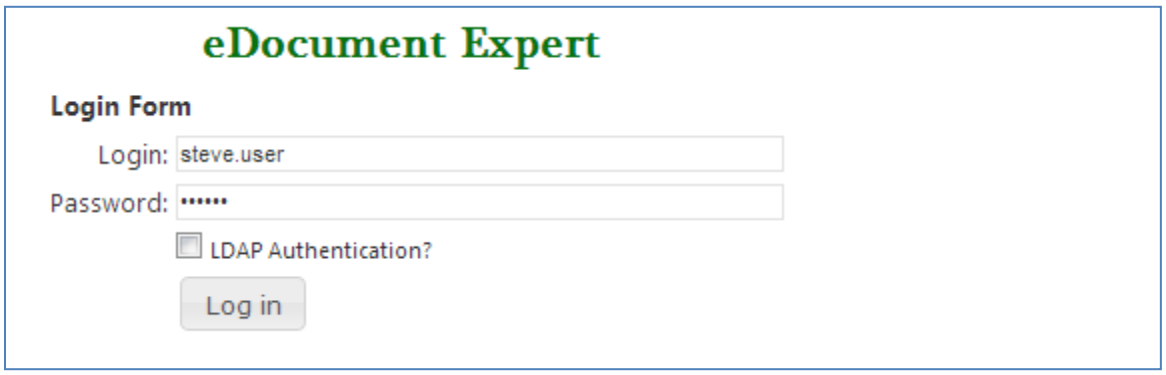
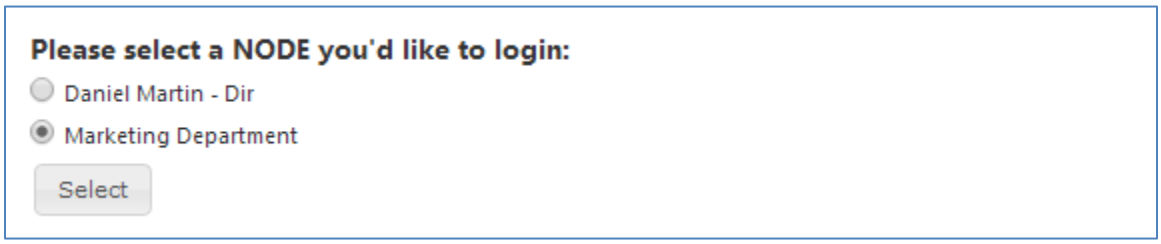
Chapter 1
Navigating the User Interface

Login Screen



To log in, direct your web browser to your organization's eDocument Expert local intranet address. From the login screen simply enter your user name in the Login field and password in the Password field. If the eDocument Expert install is configured for LDAP authentication, then place a checkmark in the LDAP Authentication box. Finally, click Log in.

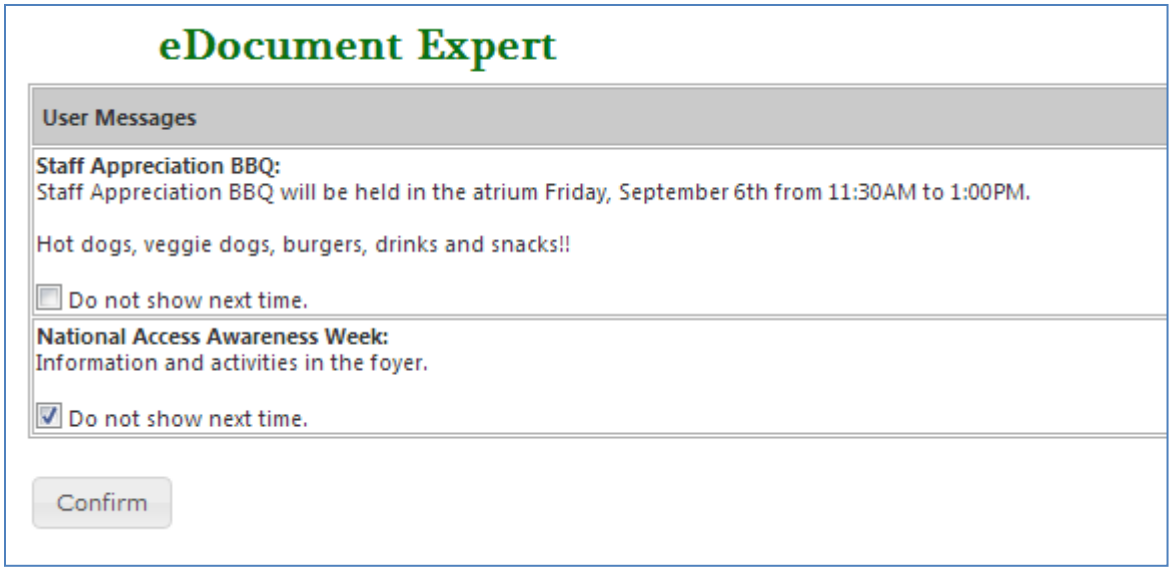
Node Selection



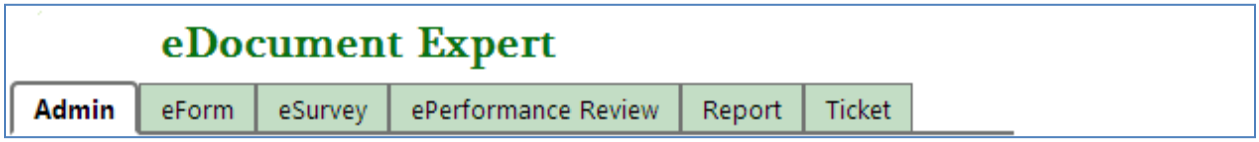
If more than one node has been assigned to you (for example, an employee and a department), you will be given a choice of node upon log in. Click the radio button next to the desired node and click Select.

Messages

After logging in, you may be presented with one or more messages. If you do not wish to view the message upon next login, place a checkmark in the corresponding box and click Confirm.


eDocument Expert
User Messages
Staff Appreciation BBQ:
Staff Appreciation BBQ will be held in the atrium Friday, September 6th from 11:30AM to 1:00PM.
Hot dogs, veggie dogs, burgers, drinks and snacks!!
Do not show next time.
National Access Awareness Week:
Information and activities in the foyer.
Do not show next time.
Confirm

Main Menu



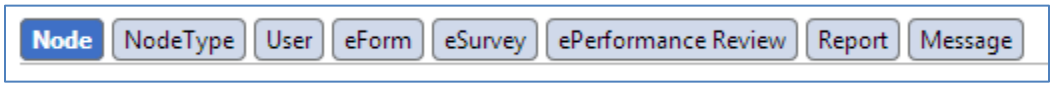
The eDocument Expert user interface gives you access to all application functionality via any common web browser. Along the top you will see the main menu with one or more of the following tabs depending on the user roles assigned to you:

- **Admin:** The admin section is a place to create and maintain application objects including: Node, NodeType, User, eForm, eSurvey, ePerformance Review, Report, Message. You will see this tab if you have at least one of following roles: NodeAdmin, NodeTypeAdmin, UserAdmin, eFormAdmin, eSurveyAdmin, ePerformanceAdmin, ReportAdmin, MessageAdmin. The admin sub-sections are described in the next section.
- **eForm**: eForm gives organizations the ability to replace paper-based forms, allowing users to submit, access and manage information online. You will see this tab if you have the eFormUser role.
- **eSurvey:** eSurvey is a tool to request, collect and analyse feedback from multiple users on any number of different topics. Clicking on this tab will show you a list of the available eSurveys at the current node. You will see this tab if you have the eSurveyUser role.
- **ePerformance Review**: ePerformance Review creates a single document for each review in which the employee's self-appraisal and the manager's appraisal are combined so that results can be viewed side-by-side. Clicking on this tab will show you a list of the available ePerformance Reviews to complete as an employee and, if you are an

ePerformanceAppraiser, submitted ePerformance Reviews to appraise as a manager. You will see this tab if you have the ePerformanceUser role.

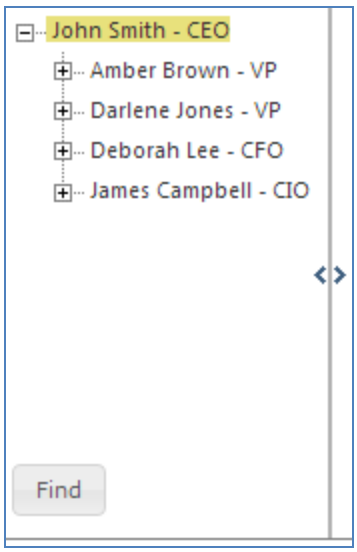
- **Report**: Reports provide a quick way to see information from multiple responses for eForm, eSurvey and ePerformance Review (and more). The Report module functionality can be expanded to provide access to any report developed and hosted in SQL Server Reporting Services (SSRS) on the company network. Clicking on this tab will bring you to a list of subscribed reports. You will see this tab if you have the ReportUser role.
- **Ticket**: The ticket section provides a means to report issues and submit change requests to eDocument Expert support. You will see this tab if you have the TicketAdmin role or TicketUser role.

Admin Sub-Sections



The admin section is comprised of seven sub-sections. What is displayed depends on the user roles assigned to you.

- **Node**: Add, edit, remove and move nodes. Available if you have the NodeAdmin role.
- **NodeType**: Add, edit, set and remove node types. Available if you have the NodeTypeAdmin role.
- **User:** Add, edit and remove users; assign roles to users; reset passwords for users; add and remove additional nodes to and from users. Available if you have the UserAdmin role.
- **eForm:** Add, copy, edit, remove and post eForms. Available if you have the eFormAdmin role.
- **eSurvey:** Add, copy, edit, remove and post eSurveys. Available if you have the eSurveyAdmin role.
- **ePerformanceReview:** Add, copy, edit, remove and post ePerformance Reviews. Available if you have the ePerformanceAdmin role.
- **Report:** Add, edit and remove reports. Available if you have the ReportAdmin role.
- **Message:** Add, edit and remove messages. Available if you have the MessageAdmin role.



Navigating the Node Hierarchy

The Node Explorer is displayed in the left hand pane of the browser window. When you login, the node at which your account was created is displayed along with its child nodes.

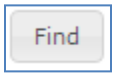
Each two connected nodes have a parent-child relationship. The child node is displayed to the bottom and right of the parent node

and connected by a dotted line. Each parent node can have multiple child nodes, while a child node can only have one parent node. The relationship between parent and child nodes plays a key role in the functionality of eDocument Expert as will be further explained in later chapters.

To expand the node hierarchy click the plus sign next to a node name. The node's child nodes will be displayed.

To collapse the node hierarchy click the minus sign next to a node name. The node's child nodes will be hidden.

To hide the Node Explorer click the left arrow on the separating line. Click the right arrow to show the Node Explorer again.



To search for a node click the Find button at the bottom of the Node Explorer. In the Node Name field enter either the exact name of the node or the partial name of the node surrounded by wild character signs (%james%. for example). Matching results are displayed. Clicking on the name will bring you to that node in the Node Explorer.

User Information Self-Management

You can reset your password and change user details by clicking on your name in the upper right corner of the browser window.

How to Edit User Information

1. Click on your name in upper right corner of the window.
2. Edit fields as desired (see User Management section for field constraints).
3. Click the Submit button.

How to Reset Password

1. Click on your name in upper right corner of the window.
2. Click Reset Password button.
3. Enter New Password (range 6-20 characters).
4. Confirm Password.
5. Click the Submit button.

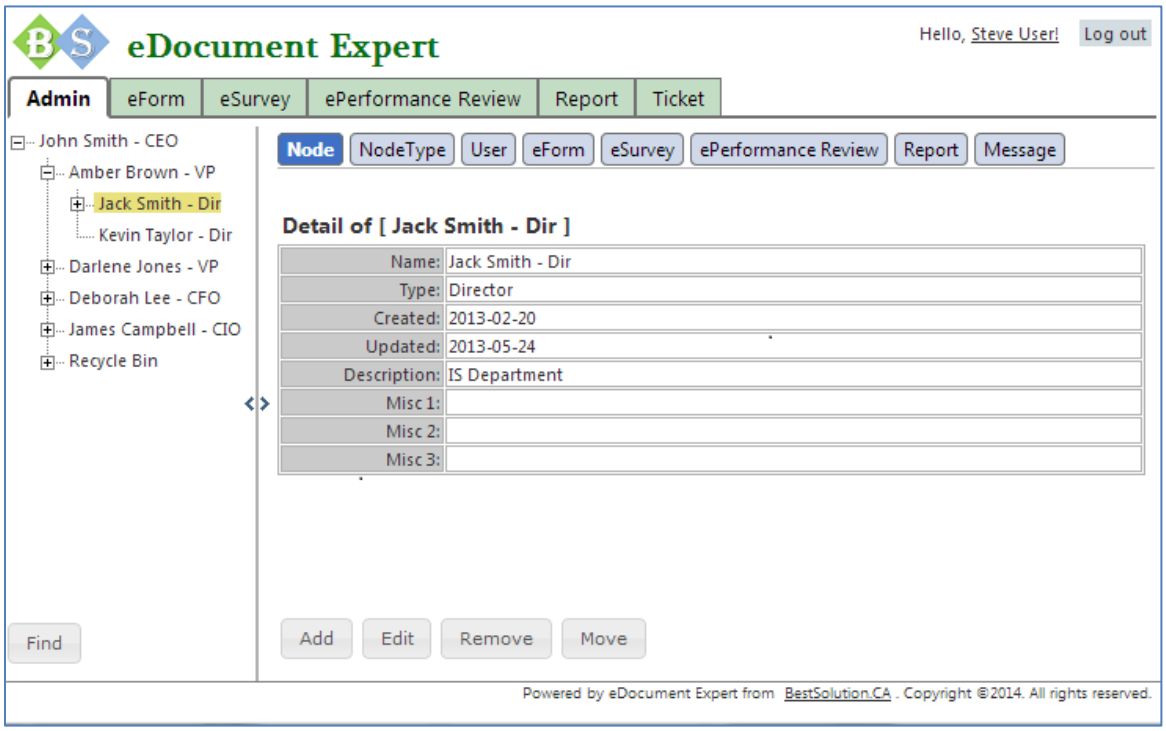
Chapter 2
Managing the Node Hierarchy

eDocument Expert provides the means to build a practically unlimited node hierarchy in a tree based view. This is intended to mirror the organizational chart and reflect the employee reporting hierarchy. The parent-child relationship between nodes drives how information is shared and protected in eDocument Expert. Managers (in the parent node position) are able to view eForm and ePerformance Review information about employees reporting under them (child node position) but not of employees in other branches of the hierarchy.

The node hierarchy plays a key role in the functionality of all the features of eDocument Expert. Every object created (eForm, eSurvey, ePerformance Review) belongs to a node. Access to use the object and view object responses depends on which node a user belongs to. For example, if you are a manager you can view eForm responses by your employees, but not responses of employees in another department.

Managing Nodes

The Admin-Node sub-section of eDocument Expert allows you to manage the node hierarchy by adding, editing, removing and moving nodes. To manage the node hierarchy you must be assigned the NodeAdmin role.



The information provided for the selected node includes:

- **Name** - Name of the node.
- **Type** - Type of the node (e.g. corporate title, department, cost centre, etc). These are managed in the Admin-Node Type sub-section.
- **Created** - Date the node was created.
- **Updated** - Date the node was last updated.
- **Description -** Description of the node.
- **Misc 1** - Miscellaneous text field one.
- **Misc 2** - Miscellaneous text field two.
- **Misc 3** - Miscellaneous text field three.

The following functions can be accessed for the selected node:

- **Add** - Add a new node as a child node of the selected node.
- **Edit** - Edit the selected node.
- **Remove** - Remove the selected node and all child nodes.
- **Move** - Move the selected node within the hierarchy or move the selected node's child nodes to another node.

How to Add a Node

1. Navigate to the Admin-Node sub-section in the browser window.
2. In the Node Explorer, select the desired parent node. The new node will be a child node to the selected node.
3. Click the Add button.
4. Enter the Name.
5. Select the Type. If set as ‘Recycle Bin’, the node can be used as a place to disable users and content without the need for permanent deletion.
6. Complete the other optional fields.
7. Click the Submit button. The node is now created. Next you can add users and other objects to the node.

How to Edit a Node

1. Navigate to the Admin-Node sub-section in the browser window.
2. In the Node Explorer, select the node wish to edit.
3. Click the Edit button.
4. Edit fields as desired.
5. Click the Submit button. The node details are updated.

How to Remove a Node

1. Navigate to Admin-Node sub-section in the browser window.

2. In the Node Explorer, select the node you wish to remove.
3. Click the Remove button. This will permanently remove the node, all child nodes, and all users and other objects created at those nodes. If you do not want a permanent deletion, consider moving the node to under the "Recycle Bin" node instead which disables node users and objects.
4. Click Submit to confirm.

How to Move a Node within the Hierarchy

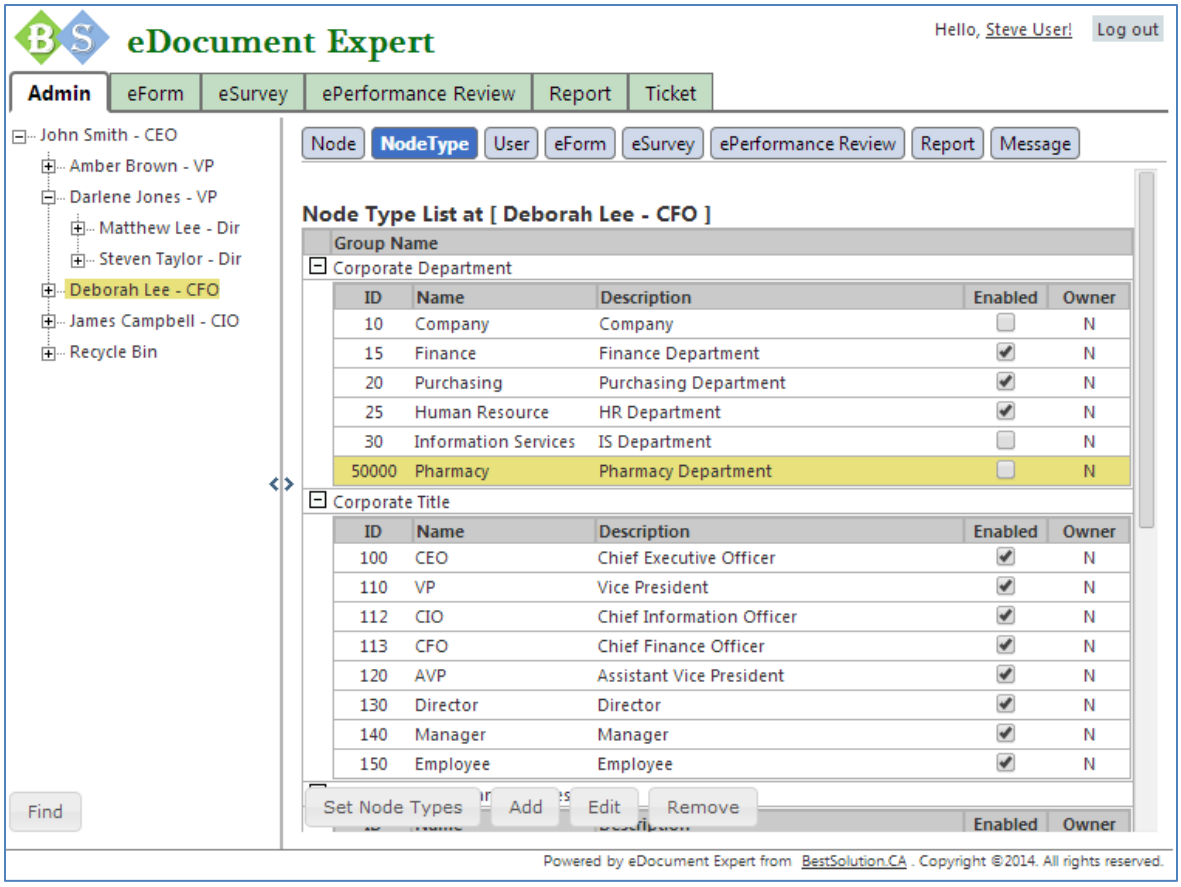
1. Navigate to Admin-Node sub-section in the browser window.
2. In the Node Explorer, select the node that you wish to move.
3. Click the Move button. The node hierarchy will be displayed in the main browser view.
4. Select the new desired parent node.
5. Click the Move button. The node and all child nodes are moved.

How to Move a Node's Child Nodes to Another Node

1. Navigate to Admin-Node sub-section in the browser window
2. In the Node Explorer, select the node of which you wish to move all child nodes from
3. Click the Move button. The node hierarchy will be displayed in the main browser view.
4. Select the new desired parent node.
5. Click the Move Child Node(s) Only button. The child nodes of the selected node are moved.

Managing Node Types

The Admin-Node Type sub-section of eDocument Expert allows you to manage the node hierarchy by adding, editing, setting and removing node types. To manage node types you must be assigned the NodeTypeAdmin role.



The information provided for each node type includes:

- **Group Name** - Name of the group the node type belongs to.
- **ID** - Unique identifier of the node type.
- **Name** - Name of the node type. This is what is seen within the details of each node.
- **Description** - Description of the node type.
- **Enabled/Owner** - At the current node, indicates which node types are available when adding child nodes. Owner indicates what is currently set. Enabled is used to change the node types set.

The following functions can be accessed for the selected node/node type:

- **Set Node Types**: Set the node types available when adding child nodes at the current node.
- **Add** - Add a new node type.
- **Edit** - Edit the selected node type.
- **Remove** - Remove the selected node type.

How to Add a Node Type

1. Navigate to the Admin-NodeType sub-section in the browser window. Your current position in the node hierarchy does not have any impact when adding, editing or removing node types.
2. If desired, select the Group Name title of the group you wish to add the node type to.
3. Click the Add button.
4. Enter the Group Name. If a group was selected first, this field will be auto-populated. Entering a Group Name not already in use will result in the creation of a new group.
5. Enter the Name and Description.
6. Click the Submit button. The node type is now created.

How to Edit a Node Type

1. Navigate to the Admin-NodeType sub-section in the browser window.
2. Select the node type you wish to edit.
3. Click the Edit button.
4. Edit fields as desired.
5. Click the Submit button. The node type details are updated. Nodes of this node type are also updated accordingly.

How to Set Node Types Available at a Node

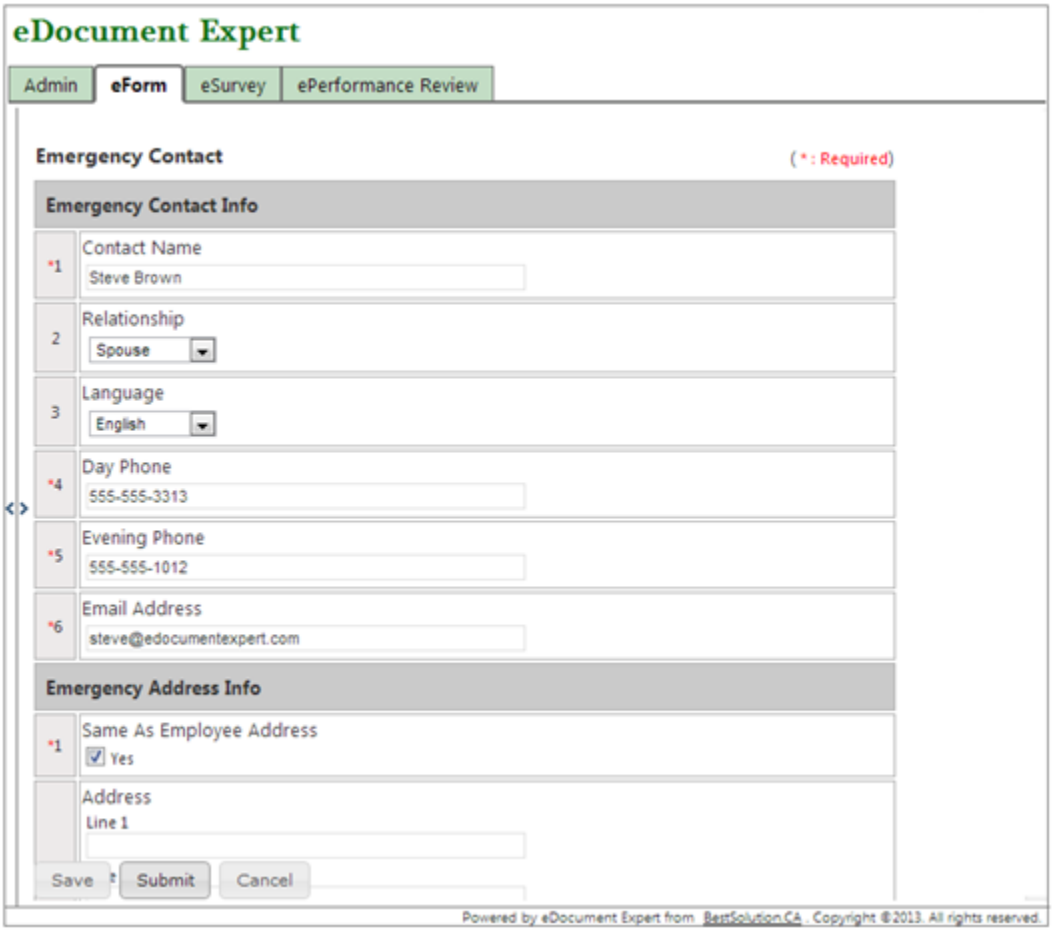
1. Navigate to the Admin-NodeType sub-section in the browser window
2. In the Node Explorer, select the node at which you would like to set node types.
3. Place a checkmark in the Enabled box of each node type you would like to make available when adding child nodes.
4. Click the Set Node Types button.
5. Click Submit to confirm. Whenever a new child node is added under this node, only those node types set will be available.

How to Remove a Node Type

1. Navigate to tge Admin-NodeType sub-section in the browser window.
2. Select the node type you wish to remove.
3. Click the Remove button. The node type can only be removed if it is not assigned to any nodes. If it is, you will get a message indicating this. Before removal you will need to change each node of this node type to a different node type.
4. Click Submit to confirm. The node type is removed.

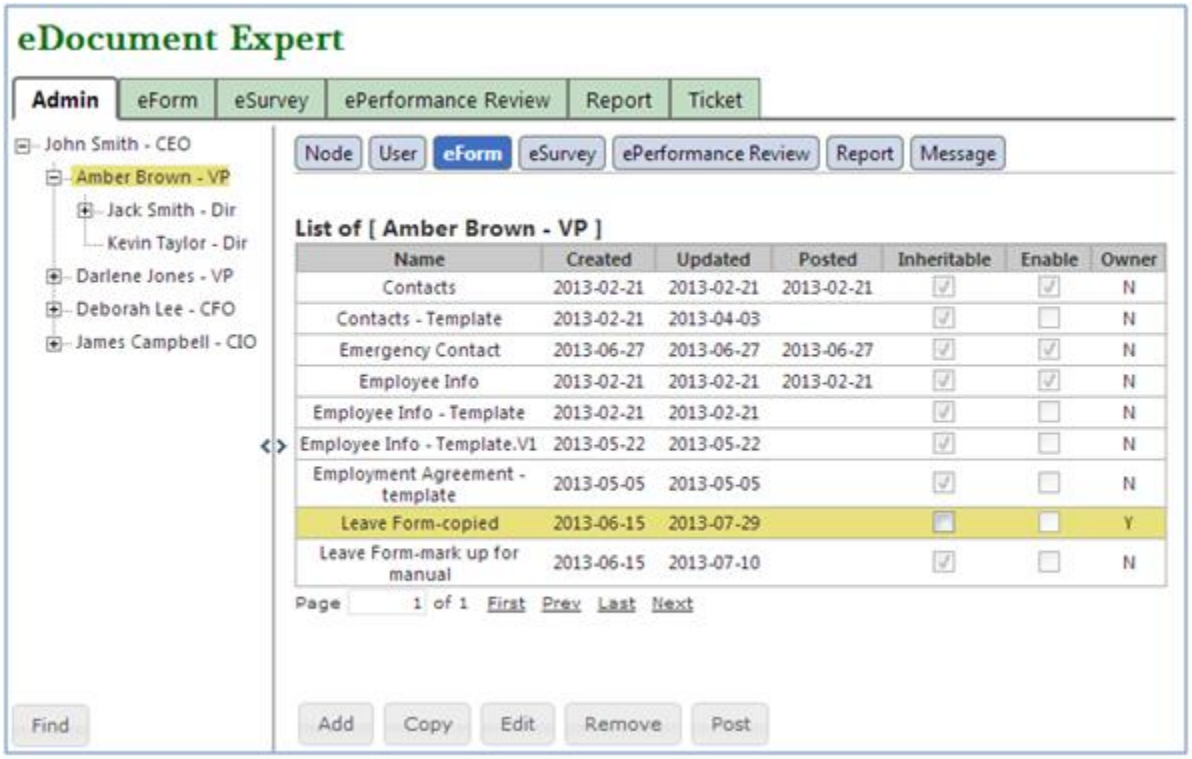
Chapter 3
eForm

eForm gives organizations the ability to replace paper-based forms, allowing users to submit, access and manage information online. Users can fill out an eForm to make their information viewable by those in their parent node path (e.g. manager, director, salesperson etc.). Results are not viewable by other branches in the hierarchy, ensuring protection of confidential information.



Managing eForms

The Admin-eForm sub-section of eDocument Expert allows you to add, copy, edit, remove and post eForms. To manage eForms you must be assigned the eFormAdmin role.



The eForm List shows all eForms available at a selected node. The information provided for each eForm in the list includes:

- **Name** - Name of the eForm.
- **Created** - Date the eForm was first created.
- **Updated** - Date the eForm was last updated.
- **Posted** - Date the eForm was last moved from development to production.
- **Inheritable** - Indicates if the eForm is inheritable from owner node to child nodes. If checked, eForm responses can be submitted at the owner node and all child nodes under the owner node. If unchecked. eForm responses can only be submitted at the owner node.
- **Enable** - Indicates if the eForm is enabled for eForm users to view and complete.
- **Owner** - Indicates if the current node is the owner of the eForm. The owner is the node at which the eForm was first created. The eForm can be modified only at the owner node.

The following functions can be accessed at the bottom of the eForm List:

- **Add** - Add a new eForm.
- **Copy** - Make a copy of an existing eForm.

- **Edit** - Edit an existing eForm.
- **Remove** - Remove an eForm.
- **Post** - Move an eForm from development to production so that it can be used by eForm users.

How to Add a New eForm

1. Navigate to the Admin-eForm sub-section in the browser window.
2. In the Node Explorer, select the node at which you wish to add the eForm. The selected node will be the owner of the eForm ("owner node"). The owner node and the Inheritable status determine at which nodes eForm responses can be submitted.
3. Click Add. The Form Builder interface will be displayed.
4. Enter the Name and Description.
5. If you wish to allow users to reset their submitted eForm responses place a checkmark in the Owner Reset box. If not checked, only eForm administrators can reset submitted eForm responses.
6. Use the Form Builder interface to add question sections, questions, and answer choices to the eForm. To learn how to use the Form Builder to complete the eForm see Chapter 6 (Building eForms, eSurveys and ePerformance Reviews).
7. Click Submit once the eForm is complete. A new eForm is created. You will be returned to the eForm List.

How to Make a Copy of an Existing eForm

1. Navigate to the Admin-eForm sub-section in the browser window.
2. In the Node Explorer, select the node at which you wish to add the eForm copy. The selected node will be the owner of the eForm ("owner node"). The owner node and the Inheritable status determine at which nodes eForm responses can be submitted.
3. From the eForm List, select the existing eForm to copy.
4. Click Copy. A new eForm is created. You will be returned to the eForm List. The new eForm will have the name of the copied eForm with a suffix added.

How to Post an eForm

1. Navigate to the Admin-eForm sub-section in the browser window.
2. In the Node Explorer, select the owner node of the eForm you wish to post.
3. From the eForm List, select the eForm to post.
4. Click Post. The eForm is now moved from development to production.
5. If you wish to allow eForm responses to be submitted at all child nodes, as well as the owner node place a checkmark in the Inheritable box. If not checked, eForm responses are only permitted at the owner node.

6. Place a checkmark in the Enable box to make the eForm viewable and usable by eForm users. If not checked, the eForm cannot be accessed through the eForm section although results are still viewable through reports.

How to Edit an Existing eForm

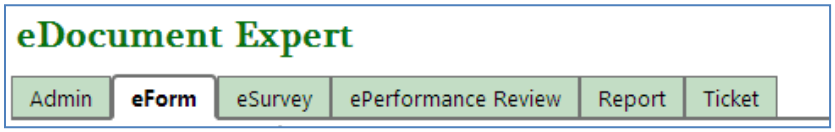
1. Navigate to the Admin-eForm sub-section in the browser window.
2. In the Node Explorer, select the owner node of the eForm you wish to edit.
3. From the eForm List, select the eForm to edit.
4. Click Edit. The Form Builder interface will be displayed.
5. Enter the Name and Description.
6. If you wish to allow users to reset their submitted eForm responses place a checkmark in the Owner Reset box. If not checked, only eForm administrators can reset submitted eForm responses.
7. Use the Form Builder interface to remove, modify and add question sections, questions and answer choices. To learn how to use the Form Builder to complete the eForm see Chapter 6 (Building eForms, eSurveys and ePerformance Reviews).
8. Click Submit once the eForm is complete. Once this step is completed, the eForm will be unposted and all existing eForm responses will be deleted. If you do not want the existing responses to be deleted, instead you should make a copy of the eForm and edit the copy.
9. Click Submit again to confirm. You will be returned to the eForm List.

How to Remove an eForm

1. Navigate to the Admin-eForm sub-section in the browser window.
2. In the Node Explorer, select the owner node of the eForm you wish to remove.
3. From the eForm List, select the eForm to remove.
4. Click Remove. Once this step is completed, the eForm and all responses will be deleted
5. Click Submit to confirm. You will be returned to the eForm List.

Using eForms

The final three functions described in this chapter are related to using eForms and are completed via the eForm section. To complete, you must be assigned the eFormUser role.



How to Submit an eForm Response

1. Navigate to the eForm section in the browser window. The list of available eForms at your node will be displayed.
2. Select the eForm you wish respond to.
3. Click Fill In. The eForm will be displayed. Required fields are indicated by a red * asterisks.
4. Complete the eForm. If you wish to save your answers and submit later, then click Save.
5. Once you are ready to submit, click Submit. If you have not completed required fields or failed any of the validation rules, you will not be able to submit and will receive an error message. All error sources will be identified.
6. Click Submit again to confirm. Your response will now be viewable by users permitted to do so by their place in the node hierarchy.

How to View an eForm Response

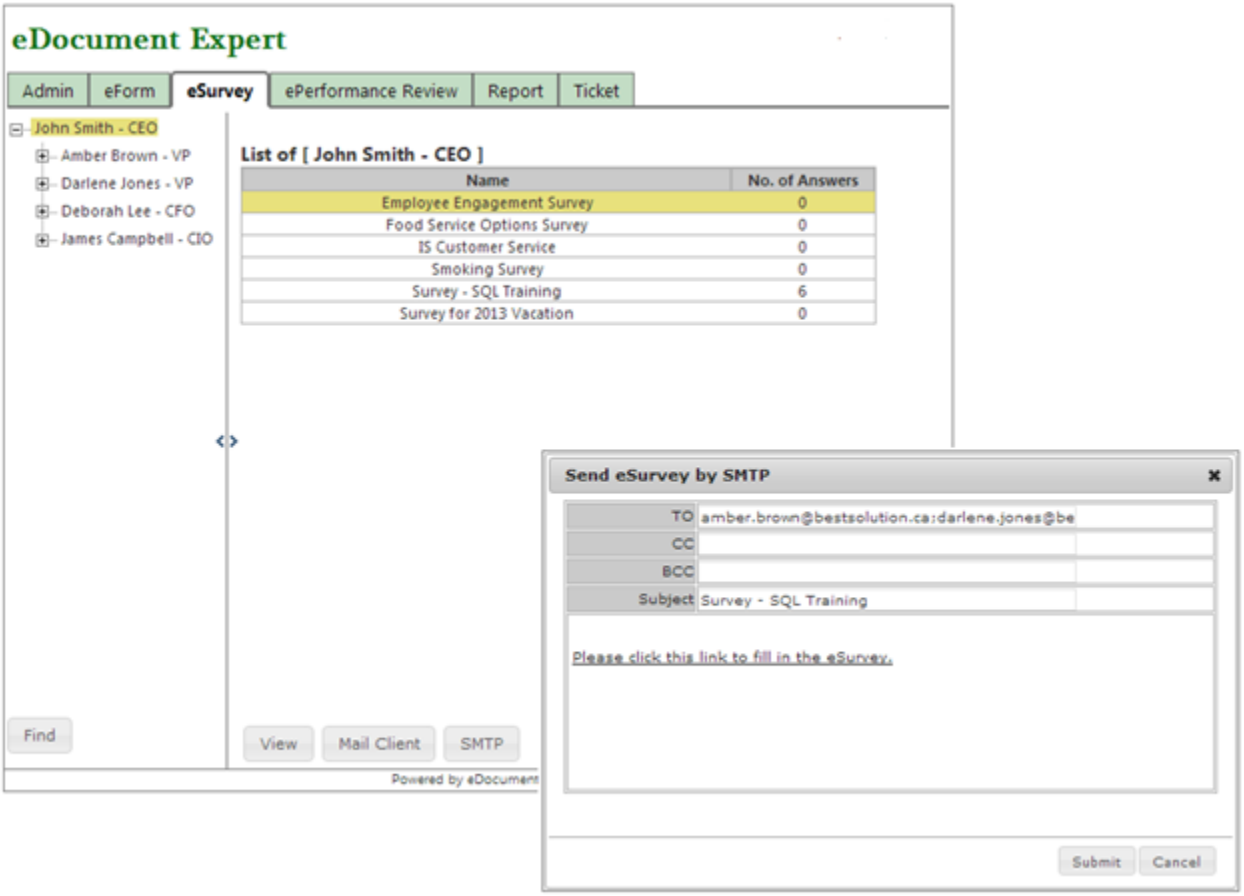
1. Navigate to the eForm section in the browser window.
2. In the Node Explorer, select the user's node where the response was submitted. The list of available eForms at that node will be displayed. Those with submitted responses will have a date/time populated in the Submitted field.
3. Select the eForm response you wish to view.
4. Click View. The submitted eForm response will be displayed.
5. To exit click Go Back to List

How to Reset a Submitted eForm Response

1. Navigate to the eForm section in the browser window
2. In the Node Explorer, select the user's node where the response was submitted.
3. Select the eForm response you wish to reset.
4. If you are the owner of the response, click Reset by Owner. If you are an administrator, Click Reset.
5. Click Submit to confirm. The submitted response will be reset. All answers are saved, but only viewable by the owner of the original response.

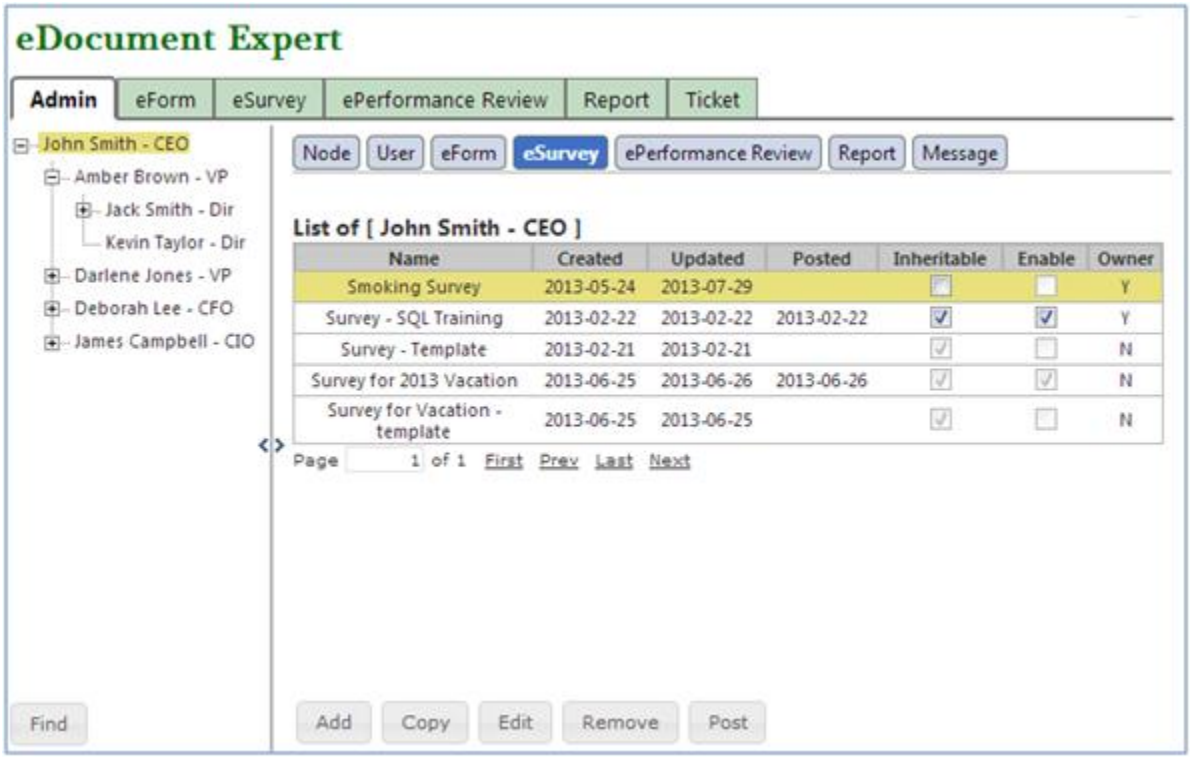
Chapter 4
eSurvey

eSurvey is a tool to request, collect and analyse feedback from multiple users on any number of different topics. Survey participation requests can be sent via SMTP or any popular Mail Client (such as Outlook, Gmail, etc). Data from every completed survey will be collected and populated into the eSurvey results set.



Managing eSurveys

The Admin-eSurvey sub-section of eDocument Explorer allows you to add, copy, edit, remove and post an eSurvey. To manage eSurveys you must be assigned the eSurveyAdmin role.



The eSurvey List shows all eSurveys available at a selected node. The information provided for each eSurvey in the list includes:

- **Name** - Name of the eSurvey.
- **Created** - Date the eSurvey was first created.
- **Updated** - Date the eSurvey was last updated.
- **Posted** - Date the eSurvey was last moved from development to production.
- **Inheritable** - Indicates if the eSurvey is inheritable from owner node to child nodes. If checked, eSurvey requests can be emailed from the owner node and all child nodes under the owner node. If unchecked eSurvey requests can only be emailed from the owner node.
- **Enable** - Indicates if the eSurvey is enabled so that eSurvey users can email survey requests.
- **Owner** - Indicates if the current node is the owner of the eSurvey. The owner is the node at which the eSurvey was first created. The eSurvey can be modified only at the owner node.

The following functions can be accessed at the bottom of the eSurvey List:

- **Add** - Add a new eSurvey.

- **Copy** - Make a copy of an existing eSurvey.
- **Edit** - Edit an existing eSurvey.
- **Remove** - Remove an eSurvey.
- **Post** - Move an eSurvey from development to production so that it can be used by eSurvey users.

How to Add a New eSurvey

1. Navigate to the Admin-eSurvey sub-section in the browser window.
2. In the Node Explorer, select the node at which you wish to add the eSurvey. The selected node will be the owner of the eSurvey ("owner node"). The owner node and the Inheritable status determine at which nodes eSurvey requests can be emailed from.
3. Click Add. The Form Builder interface will be displayed.
4. Enter the Name and Description
5. Use the Form Builder interface to add question sections, questions, and answer choices to the eSurvey. To learn how to use the Form Builder to complete the eSurvey see Chapter 6 (Building eForms, eSurveys and ePerformance Reviews).
6. Click Submit once the eSurvey is complete. A new eSurvey is created. You will be returned to the eSurvey List.

How to Make a Copy of an Existing eSurvey

1. Navigate to the Admin-eSurvey sub-section in the browser window.
2. In the Node Explorer, select the node at which you wish to add the eSurvey copy. The selected node will be the owner of the eSurvey ("owner node"). The owner node and the Inheritable status determine at which nodes eSurvey requests can be emailed from.
3. From the eSurvey List, select the existing eSurvey to copy.
4. Click Copy. A new eSurvey is created. You will be returned to the eSurvey List. The new eSurvey will have the name of the copied eSurvey with a suffix added.

How to Post an eSurvey

1. Navigate to the Admin-eSurvey sub-section in the browser window.
2. In the Node Explorer, select the owner node of the eSurvey you wish to post.
3. From the eSurvey List, select the eSurvey to post.
4. Click Post. The eSurvey is now moved from development to production.
5. If you wish to allow eSurvey requested to be emailed from all child nodes as well as the owner node then place a checkmark in the Inheritable box. If not checked, eSurvey request emails can only be sent at the owner node.

6. Place a checkmark in the Enable box to make the eSurvey viewable and usable by eSurvey users. If not checked, the eSurvey is not available for email requests to be sent although results are still viewable through reports.

How to Edit an Existing eSurvey

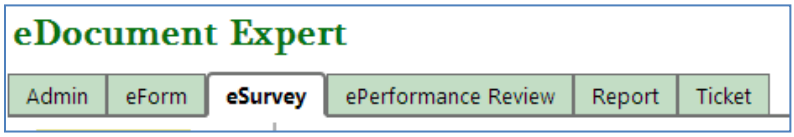
1. Navigate to the Admin-eSurvey sub-section in the browser window.
2. In the Node Explorer, select the owner node of the eSurvey you wish to edit.
3. From the eSurvey List, select the eSurvey to edit.
4. Click Edit. The Form Builder interface will be displayed.
5. Enter the Name and Description.
6. Use the Form Builder interface to remove, modify and add question sections, questions and answer choices. To learn how to use the Form Builder to complete the eSurvey see Chapter 6 (Building eForms, eSurveys and ePerformance Reviews).
7. Click Submit once the eSurvey is complete. Once this step is completed, the eSurvey will be unposted and all existing eSurvey responses will be deleted. If you do not want the existing responses to be deleted, instead you should make a copy of the eSurvey and edit the copy.
8. Click Submit again to confirm. You will be returned to the eSurvey List.

How to Remove an eSurvey

1. Navigate to the Admin-eSurvey sub-section in the browser window.
2. In the Node Explorer, select the owner node of the eSurvey you wish to remove.
3. From the eSurvey List, select the eSurvey to remove.
4. Click Remove. Once this step is completed, the eSurvey and all responses will be deleted.
5. Click Submit to confirm. You will be returned to the eSurvey List.

Using eSurveys

The final three functions described in this chapter are related to using eSurveys and are completed via the eSurvey section. To complete, you must be assigned the eSurveyUser role.



How to Email an eSurvey Request by Mail Client

1. Navigate to the eSurvey section in the browser window. The list of available eSurveys at your node will be displayed.
2. Select the eSurvey you wish to email requests for.
3. Click Mail Client. eDocument Expert will open your computer's default mail client message composer. The composer will be populated with the eSurvey title in subject line and the eSurvey request address in the body.
4. Enter email address(es) to send the request to, modify the message title and body if desired, and send. Your eSurvey audience will now be able to submit responses.

How to Email an eSurvey Request by SMTP

1. Navigate to the eSurvey section in the browser window. The list of available eSurveys at your node will be displayed.
2. Select the eSurvey you wish to email requests for.
3. Click SMTP (Simple Mail Transfer Protocol). The Send eSurvey by SMTP window will open. The window will be populated with the eSurvey title in subject line and the eSurvey request link in the body.
4. Enter email address(es) to send the request to, modify the message title and body if desired, and send. Your eSurvey audience will now be able to submit responses (note: if the message was undeliverable you will get an error message).

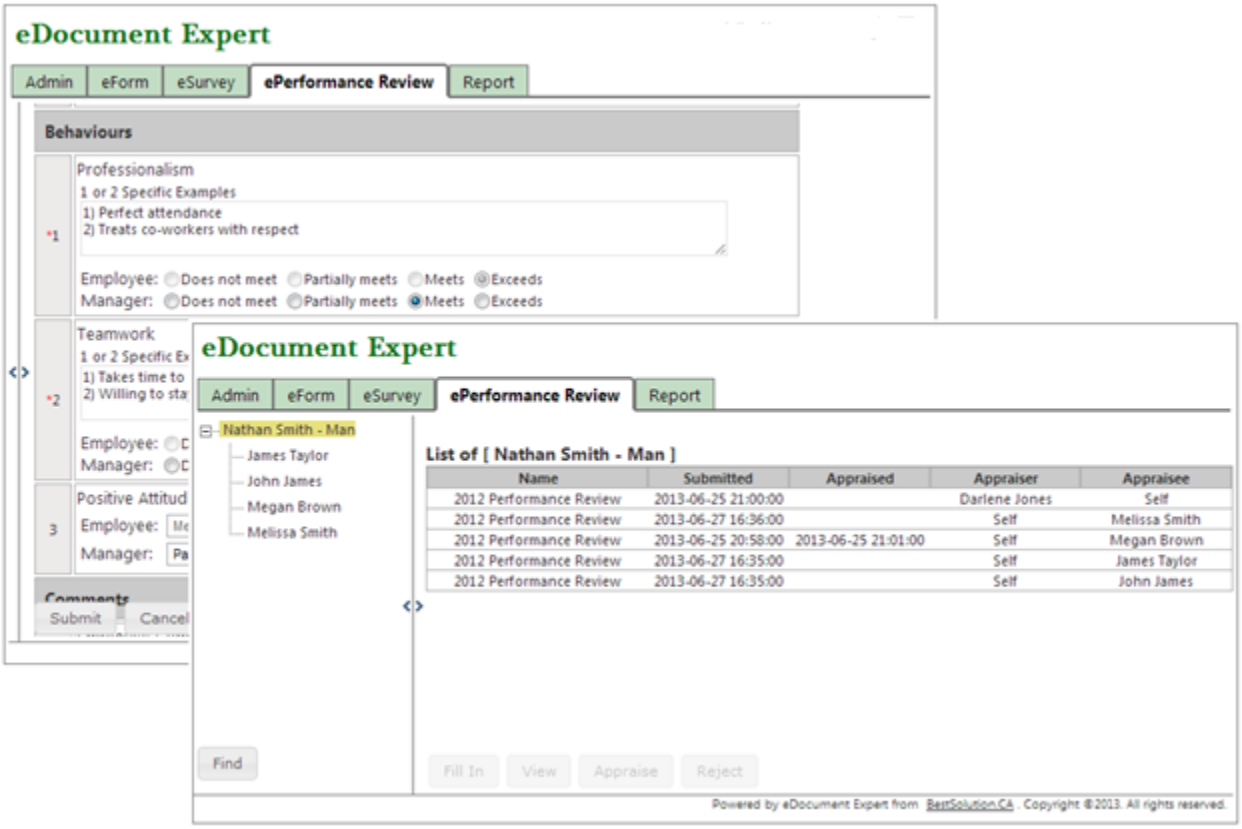
How to Respond to an eSurvey

1. To respond to an eSurvey, follow the link in the email request. The eSurvey will be displayed. Required fields are indicated by a red * asterisks.
2. Complete the eSurvey and click Submit. If you have not completed required fields or failed any of the validation rules, you will not be able to submit and will receive an error message. All error sources will be identified.
3. Click Submit again to confirm.

To view eSurvey responses use Reports. Note: you will be able to identify multiple responses sent from the same device based on the IP address.

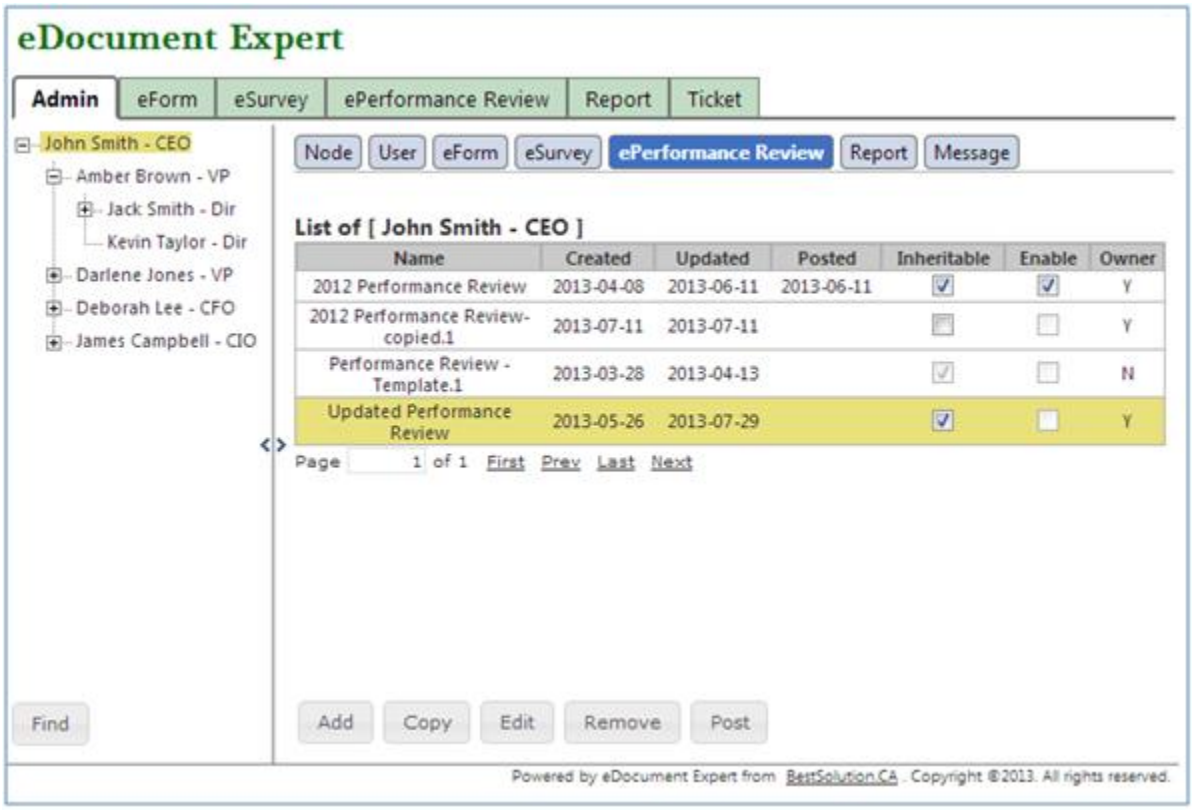
Chapter 5
ePerformance Review

ePerformance Review creates a single document for each review in which the employee's self-appraisal is combined with the managerial appraisal so that results can be viewed side-by-side. In the review process, managers and employee can complete their parts on individual timelines and notify one another upon completion. Managers are given a single view to see all pending and completed appraisals.



Managing ePerformance Reviews

The Admin-ePerformance Review sub-section of eDocument Explorer allows you to add, copy, edit, remove and post an ePerformance Review. To manage ePerformance Reviews you must be assigned the ePerformanceAdmin role.



The ePerformance Review List shows all ePerformance Review available at a selected node. The information provided for each ePerformance Review in the list includes:

- **Name** - Name of the ePerformance Review.
- **Created** - Date the ePerformance Review was first created.
- **Updated** - Date the ePerformance Review was last updated.
- **Posted** - Date the ePerformance Review was last moved from development to production.
- **Inheritable** - Indicates if the ePerformance Review is inheritable from owner node to child nodes. If checked, ePerformance Review appraisals can be completed at the owner node and all child nodes under the owner node. If unchecked, ePerformance Review appraisals can only be completed at the owner node.
- **Enable** - Indicates if the ePerformance Review is enabled so that ePerformance Review appraisals can be completed.
- **Owner** - Indicates if the current node is the owner of the ePerformance Review. The owner is the node at which the ePerformance Review was first created. The ePerformance Review can be modified only at the owner node.

The following functions can be accessed at the bottom of the ePerformance Review List:

- **Add** - Add a new ePerformance Review.
- **Copy** - Make a copy of an existing ePerformance Review.
- **Edit** - Edit an existing ePerformance Review.
- **Remove** - Remove an ePerformance Review.
- **Post** - Move an ePerformance Review from development to production so that it can be used by ePerformance Review users.

How to Add a New ePerformance Review

1. Navigate to the Admin-ePerformance Review sub-section in the browser window.
2. In the Node Explorer, select the node at which you wish to add the ePerformance Review. The selected node will be the owner of the ePerformance Review ("owner node"). The owner node and the Inheritable status determine at which nodes ePerformance Review appraisals can be completed.
3. Click Add. The Form Builder interface will be displayed.
4. Enter the Name and Description.
5. Use the Form Builder interface to add question sections, questions, and answer choices to the ePerformance Review. To learn how to use the Form Builder to complete the ePerformance Review see Chapter 6 (Building eForms, eSurveys and ePerformance Reviews).
6. Click Submit once the ePerformance Review is complete. A new ePerformance Review is created. You will be returned to the ePerformance Review List.

How to Make a Copy of an Existing ePerformance Review

1. Navigate to the Admin-ePerformance Review sub-section in the browser window.
2. In the Node Explorer, select the node at which you wish to add the ePerformance Review copy. The selected node will be the owner of the ePerformance Review ("owner node"). The owner node and the Inheritable status determine at which nodes ePerformance Review appraisals can be completed.
3. From the ePerformance Review List, select the existing ePerformance Review to copy.
4. Click Copy. A new ePerformance Review is created. You will be returned to the ePerformance Review List. The new ePerformance Review will have the name of the copied ePerformance Review with a suffix added.

How to Post an ePerformance Review

1. Navigate to the Admin-ePerformance Review sub-section in the browser window.

2. In the Node Explorer, select the owner node of the ePerformance Review you wish to post.
3. From the ePerformance Review List, select the ePerformance Review to post.
4. Click Post. The ePerformance Review is now moved from development to production.
5. If you wish to allow ePerformance Review appraisals to be completed at all child nodes as well as the owner node then place a checkmark in the Inheritable box. If not checked, ePerformance Review appraisals are allowed only at the owner node.
6. Place a checkmark in the Enable box to make the ePerformance Review viewable and usable by ePerformance Review users. If not checked, the ePerformance Review is not available for appraisals although results are still viewable through reports.

How to Edit an Existing ePerformance Review

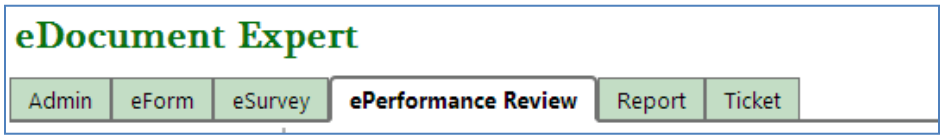
1. Navigate to the Admin-ePerformance Review sub-section in the browser window.
2. In the Node Explorer, select the owner node of the ePerformance Review you wish to edit.
3. From the ePerformance Review List, select the ePerformance Review to edit.
4. Click Edit. The Form Builder interface will be displayed.
5. Enter the Name and Description.
6. Use the Form Builder interface to remove, modify and add question sections, questions and answer choices. To learn how to use the Form Builder to complete the ePerformance Review see Chapter 6 (Building eForms, eSurveys and ePerformance Reviews).
7. Click Submit once the ePerformance Review is complete. Once this step is completed, the ePerformance Review will be unposted and all existing ePerformance Review appraisals will be deleted. If you do not want the existing appraisals to be deleted, instead you should make a copy of the ePerformance Review and edit the copy.
8. Click Submit again to confirm. You will be returned to the ePerformance Review List.

How to Remove an ePerformance Review

1. Navigate to the Admin-ePerformance Review sub-section in the browser window.
2. In the Node Explorer, select the owner node of the ePerformance Review you wish to remove.
3. From the ePerformance Review List, select the ePerformance Review to remove.
4. Click Remove. Once this step is completed, the ePerformance Review and all appraisals will be deleted.
5. Click Submit to confirm. You will be returned to the ePerformance Review List.

Using ePerformance Reviews

The final three functions described in this chapter are related to using ePerformance Reviews and are completed via the ePerformance Review section. To submit an ePerformance Review self-appraisal you must be assigned the ePerformanceUser role. To complete or reject an ePerformance Review appraisal you must be assigned both the ePerformanceUser and ePerformanceAppraiser roles.



How to Submit an ePerformance Review Self-Appraisal

1. Navigate to the ePerformance Review section in the browser window. The list of available ePerformance Reviews at your node will be displayed.
2. Select the ePerformance Review for which you wish to submit your self-appraisal.
3. Click Fill In. The ePerformance Review will be displayed. Required fields are indicated by a red * asterisks.
4. Complete the ePerformance Review self-appraisal. If you wish to save your answers and submit later, then click Save.
5. Once you are ready to submit, click Submit. If you have not completed required fields or failed any of the validation rules, you will not be able to submit and will receive an error message. All error sources will be identified.
6. Select your appraiser from the dropdown list. Possible appraisers include any user with the ePerformanceAppraiser role at your parent node. If no such user exists at your parent role, then possible appraisers are selected from your grandparent node and so on.
7. If you wish to have your appraiser notified of your submission by email place a checkmark in the corresponding box.
8. Click Submit. Your selected appraiser can now complete the ePerformance Review appraisal.

How to Complete an ePerformance Review Appraisal

1. Navigate to the ePerformance Review section in the browser window. The list of submitted ePerformance Review self-appraisals at your node will be displayed. Self-appraisals submitted to you are indicated with the value "Self" in the Appraiser column.
2. Select the submitted ePerformance Review that you wish to appraise.
3. Click Appraise. The ePerformance Review will be displayed with the self-appraisal answers populated. Required fields are indicated by a red * asterisks.
4. Complete the ePerformance Review appraisal. If you wish to save your answers and submit later, then click Save.

5. Once you are ready to submit, click Submit. If you have not completed required fields or failed any of the validation rules, you will not be able to submit and will receive an error message. All error sources will be identified.
6. If you wish to have the appraisee notified of your submission by email place a checkmark in the corresponding box.
7. Click Submit. The appraisee can now view your ePerformance Review appraisal.

How to Reject an ePerformance Review Self-Appraisal

1. Navigate to the ePerformance Review section in the browser window. The list of submitted ePerformance Review self-appraisals at your node will be displayed.
2. Select the submitted ePerformance Review that you wish to reject.
3. Click Reject. If you wish to have the appraisee notified of your rejection by email place a checkmark in the corresponding box.
4. Click Submit. The appraisee can now re-submit their ePerformance Review self-appraisal.

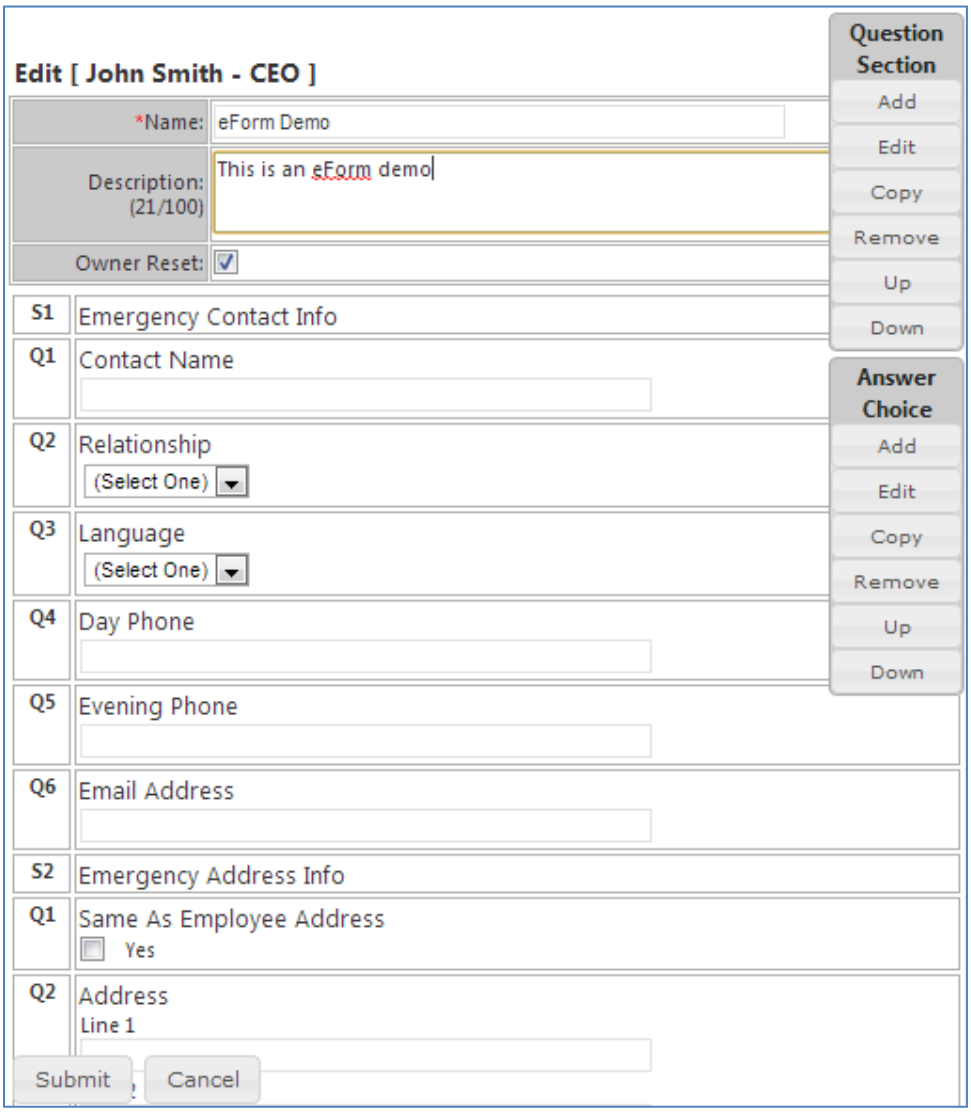
Chapter 6
Building eForms, eSurveys and ePerformance Reviews

Any time you add or edit an eForm, eSurvey or ePerformance Review the **Form Builder** interface opens. The Form Builder is an easy to use tool, common to these three eDocument Expert modules.

This chapter provides you with information on:

- How to build a form by adding question sections, questions and answer choices
- Using the Question Section and Answer Choice menus to modify a form
- The different answer choice types and validation methods

eForm Example:



Adding Question Sections, Questions and Answer Choices

1. **To add a question section:** click Add in the Question Section menu. The Add Question window opens. Type the question section text into the provided textbox (maximum 1000 characters) and click Submit. The question section provides structure to an eForm, intended to group related questions together. Question sections are labelled with an "S" followed by an incremental integer from 1 up to the total number of question sections in the eForm.

2. **To add a question:** click Add from the Question Section menu. The Add Question window opens. Type the question text into the provided textbox (maximum 1000 characters) and click Submit. The question is labelled as a question section initially. Adding an answer choice will transform it into a question. Questions are labelled with a "Q" followed by an incremental integer from 1 to the total number of questions within the question section.

3. **To add an answer choice:** click Add from the Answer Choice menu. The Add Answer Choice(s) window opens. Select the Input Type from the dropdown list and type the answer choices in the provided textbox (maximum 300 characters). Select if an answer response is Required and, if applicable, select the response Validation method. When done click Submit.

Repeat these three steps as many times as necessary to complete the desired eForm.

Modifying Forms Using the Question Section and Answer Choice Menus

The two Form Builder menus have five functions each: Add, Edit, Copy, Remove, Up, Down. These provide all the tools necessary to complete any form.

Question Section Menu

- **Add**: If you want to add a question section or question, select the question section or question to place it after and click Add. A question section will become a question once an answer choice is added to it.
- **Edit**: If you want to edit a question section or question text, select it and click Edit.
- **Copy**: If you want to copy a question section or question, select it and click Copy. The copy will be place below the original.
- **Up**: If you want to move a question or question section up, select it and click Up. Repeat as many times as necessary to move it to the desired position.
- **Down:** If you want to move a question or question section down, select it and click Down. Repeat as many times as necessary to move it to the desired position.

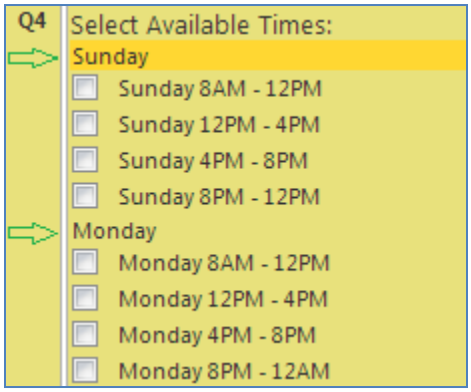
Answer Choice Menu

- **Add**: If you want to add an answer choice, select the question section or question to add it to and click Add. If the answer choice is added to a question section, the questions section will be transformed into a question. If the answer choice is added to a question, the answer choice will be added at the bottom of the question.
- **Edit**: If you want to edit an answer choice, select it and click Edit.
- **Copy**: If you want to copy answer choice, select it and click Copy. The copy will be place below the original.
- **Up**: If you want to move an answer choice up, select it and click Up. Repeat as many times as necessary to move it to the desired position within the question.
- **Down:** If you want to move an answer choice down, select it and click Down. Repeat as many times as necessary to move it to the desired position within the question.

Answer Choice Input Types

There are twelve answer choice types. Answer choices can be added in any combination within a single question.

None: No answer choice provided to user. Use this sub-type to provide more details about a question or to insert text between other answer choices within the same question.

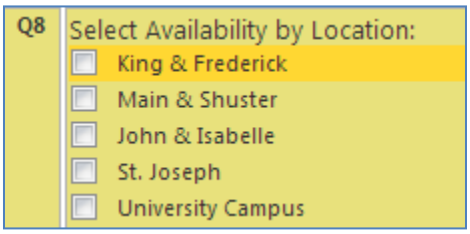


CheckBox: User can choose as many answer choices as provided in a single question. Sub-types are:

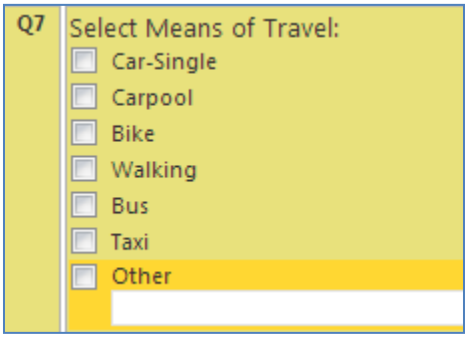
- **CheckBox-Single**: One answer choice for text entered in Answer Choice window. Use this sub-type when the answer choice requires more than one line or the check boxes

are to be mixed with other answer types in the question.

- **CheckBox-Multiple**: Multiple answer choices, one for each new line of text entered in Answer Choice window. Use this sub-type to quickly input a list of answer choices.

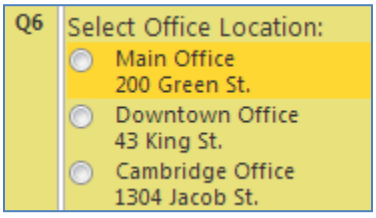


- **CheckBox with Textbox**: User provided with textbox along with CheckBox-Single answer choice. Use this sub-type if more details are expected from the user when the answer choice is selected.

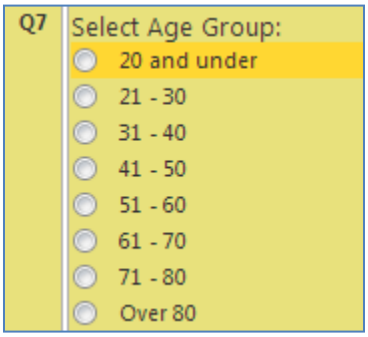


Radio: User can choose only one answer choice from those provided in a single question. Sub-types are:

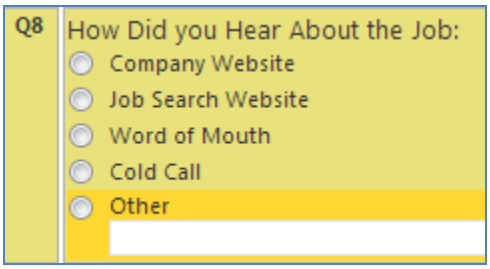
- **Radio-Single**: One answer choice for text entered in Answer Choice window. Use this sub-type when the answer choice requires more than one line or the radio buttons are to be mixed with other answer types in the question.



- **Radio-Multiple**: Multiple answer choices, one for each new line of text entered in Answer Choice window. Use this sub-type to quickly input a list of answer choices.

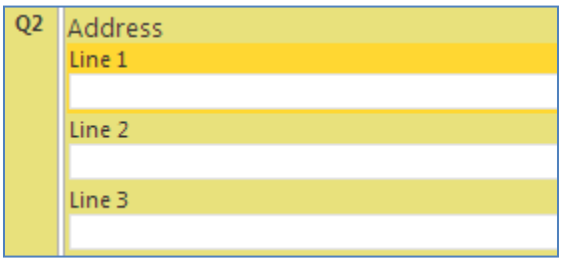


- **Radio with Textbox**: User provided with textbox along with Radio-Single answer choice. Use this sub-type if more details are expected from the user when the answer choice is selected.

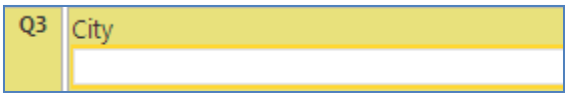


TextBox: User can enter their response to the question in a textbox. Sub-types are:

- **Single-Line Textbox**: User provided with single-line textbox. Text entered in Answer Choice window is displayed as label above textbox. Use this sub-type when question is to include multiple distinct answer choice responses.

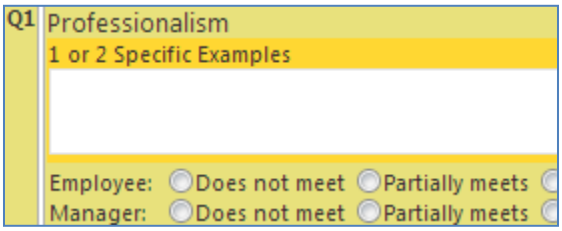


- **Single-Line Textbox without Answer Choice**: User provided with single-line textbox. There is no label for this sub-type. Use this sub-type when only one single-line response is required for a question.

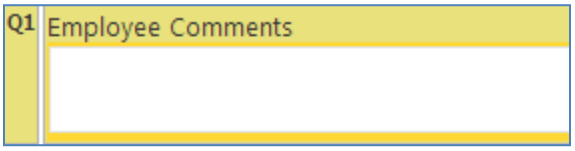


- **Multi-Line Textbox**: User provided with multi-line textbox. Text entered in Answer Choice window is displayed as label above textbox. Use this sub-type when question is

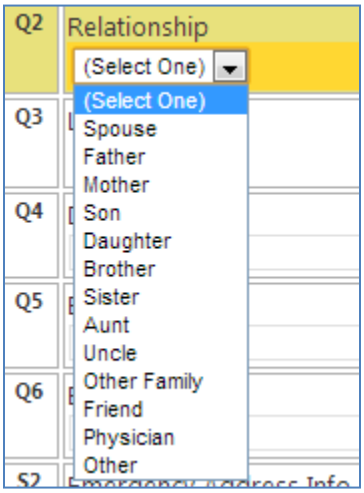
to include multiple distinct answer choice responses.



- **Multi-Line Textbox without Answer Choice**: User provided with multi-line textbox. There is no label for this sub-type. Use this sub-type when only one multi-line response is required for a question.

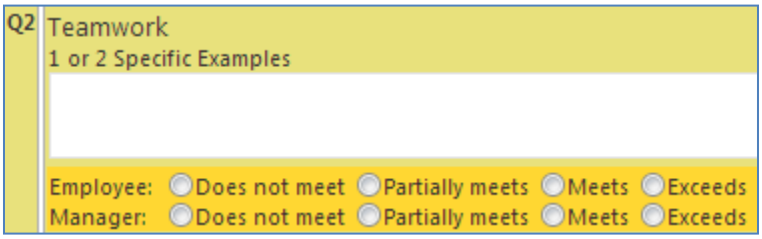


DropDown: User can choose one answer from a provided dropdown list. One answer choice is added for each new line of text entered in Answer Choice window. Use this sub-type when there are many possible answer choices, and space on the form must be conserved. When the Required option is on for this sub-type, the user must select a choice other than the first in the list.

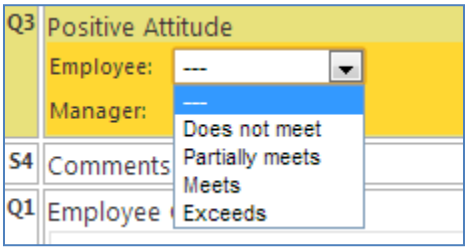


Score: Score answer choices are specific to ePerformance Review only. The purpose of the Score answer choice is so that the appraisee (employee) and appraiser (manager) can select answer choices from the options where the results can be viewed side-by-side. Sub-types are:

- **Score:Radio-Multiple:** Employee and manager each choose one answer choice from those provided in a series of radio buttons.


Q2
Teamwork
1 or 2 Specific Examples
Employee: Does not meet Partially meets Meets Exceeds
Manager: Does not meet Partially meets Meets Exceeds

- **Score:DropDown:** Employee and manager each choose one answer choice from those provided in a dropdown list.

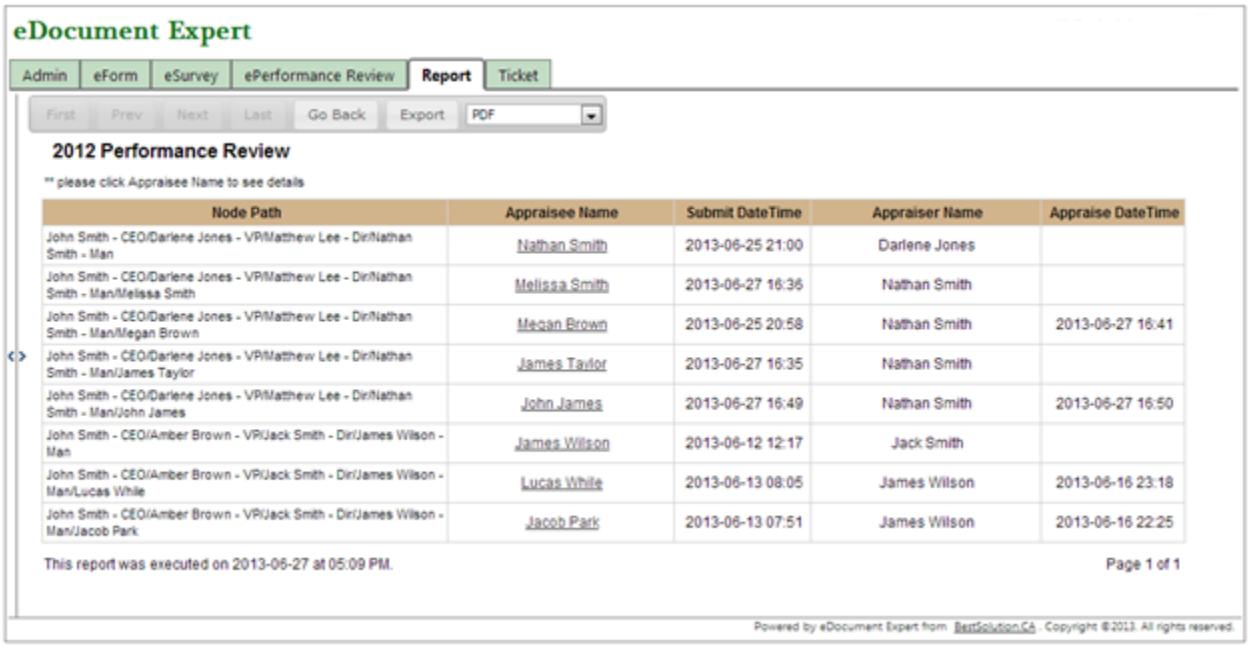


Validation Methods: There are eight validation methods (applicable to TextBox answer choice types only). Use validation methods to ensure user responses meet a desired format.

- **Email**: Response must adhere to email standard, e.g. local@domain.xyz
- **Numeric:** Only numeric characters are allowed (0 through 9)
- **Alphanumeric:** Only alphanumeric characters are allowed (A through Z, 0 through 9)
- **Date:** Response must be in the form YYYY-MM-DD. User provided with a calendar to select from when field is clicked.
- **Min-Length:** Response length must at least be the number entered in the validation field.
- **Max-Length:** Response length cannot exceed the number entered in the validation field.
- **Range-Length:** Response length must at least be the number entered in the first validation field and no greater than the number entered in the second validation field.

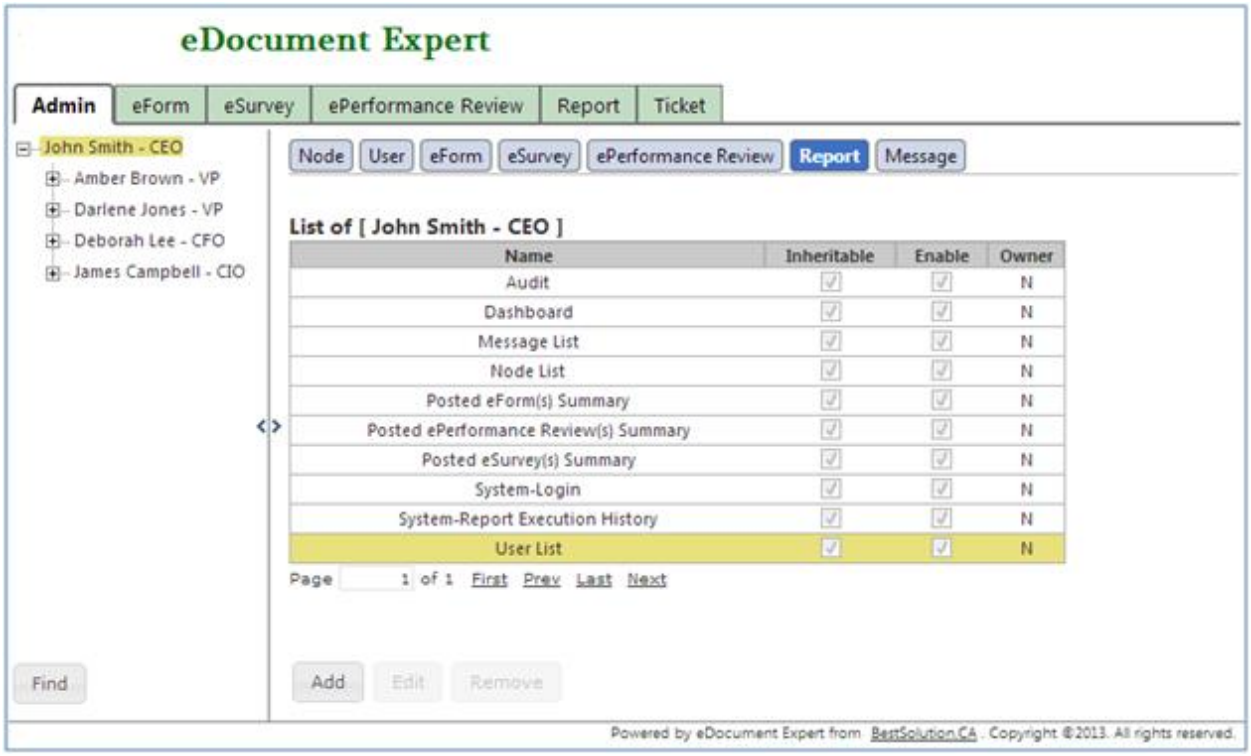
Chapter 7
Reports

eDocument Expert has pre-built reports that give users a quick way to see information from multiple responses for eForm, eSurvey and ePerformance Review (and more). This module's functionality can be expanded greatly to provide access to users to any report developed and hosted in SQL Server Reporting Services (SSRS) on the organization network. Reports can be downloaded in different formats including PDF, Excel 2003, Excel 2007-10, Word, XML, CSV etc.



Managing Reports

The Admin-Report sub-section of eDocument Explorer allows you to add, edit and remove a report. To manage reports you must be assigned the ReportAdmin role.



The Report List shows all reports available at a selected node. The information provided for each report in the list includes:

- **Name** - Name of the report.
- **Inheritable** - Indicates if the report is inheritable from owner node to child nodes. If checked, the report will be available for users at the owner node and all child nodes under the owner node. If unchecked the report will only be available to users at the owner node.
- **Enable** - Indicates if the report is enabled for users to access.
- **Owner** - Indicates if the current node is the owner of the report. The owner is the node at which the report was first created. The report can be modified only at the owner node.

The following functions can be accessed at the bottom of the Report List:

- **Add** - Add a new report.
- **Edit** - Edit an existing report.
- **Remove** - Remove a report.

How to Add a New Report

1. Navigate to the Admin-Report sub-section in the browser window.
2. In the Node Explorer, select the node at which you wish to add the report. The selected node will be the owner of the report ("owner node"). The owner node and the Inheritable status determine which users will have access to the report.
3. Click Add.
4. Enter the Report Name.

5. Enter the Reporting Server Path (RS Path). This is the SSRS report definition (RDL) deployed path in the SSRS report manager. The root node of the path is configured upon installation of eDocument Expert.
6. Enter the Description.
7. If the report is to be accessed from a parent report as a drill through only then place a checkmark in the DrillThrough box.
8. In the Export Formats section, place a checkmark in each of the boxes next to the formats you wish to allow users to export report results in. Options include: CSV (comma delimited), Excel 2003, Excel 2007-2010, PDF, TXT (tab delimited), Word 2003 and Word 2007-2010.
9. In the Roles section, place a checkmark in each of the boxes next to the roles you wish to subscribe the reports to. Only users having the selected roles will be able to access the report.
10. Click Submit.
11. If you wish the report to be accessible to subscribed users at all child nodes as well as the owner node then place a checkmark in the Inheritable box. If not checked, the report will only be available to subscribed users at the owner node.
12. Place a checkmark in the Enable box so that the report will be available to subscribed users.

How to Edit an Existing Report

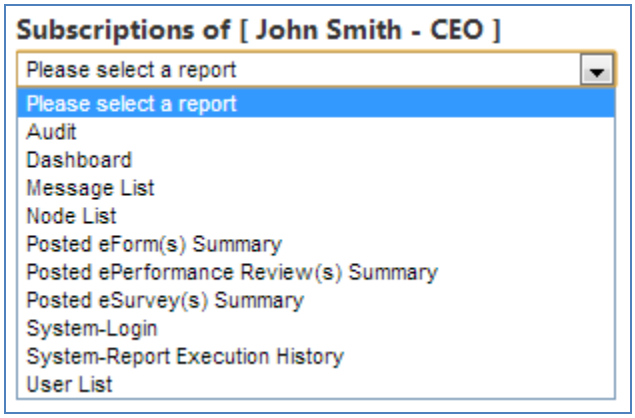
1. Navigate to the Admin-Report sub-section in the browser window.
2. In the Node Explorer, select the owner node of the report you wish to edit.
3. From the Report List, select the report to edit.
4. Edit fields as desired.
5. Click Submit. You will be returned to the Report List. The report will be updated as edited.

How to Remove a Report

1. Navigate to the Admin-Report sub-section in the browser window.
2. In the Node Explorer, select the owner node of the report you wish to remove.
3. From the Report List, select the report to remove.
4. Click Remove. Once this step is completed, the report will be deleted
5. Click Submit to confirm. You will be returned to the report List.

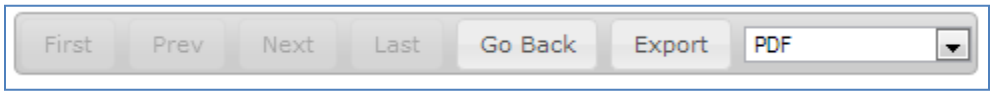
Running a Report

Running reports are completed via the Reports section. To run a report, you must be assigned the ReportUser role.



1. Navigate to the Report section in the browser window. The list of subscribed reports at your node will be displayed in a dropdown list.
2. Select the report from the dropdown list.
3. Enter the parameter values as instructed (if applicable).
4. Click View. The report results will be displayed.

Report Menu Bar

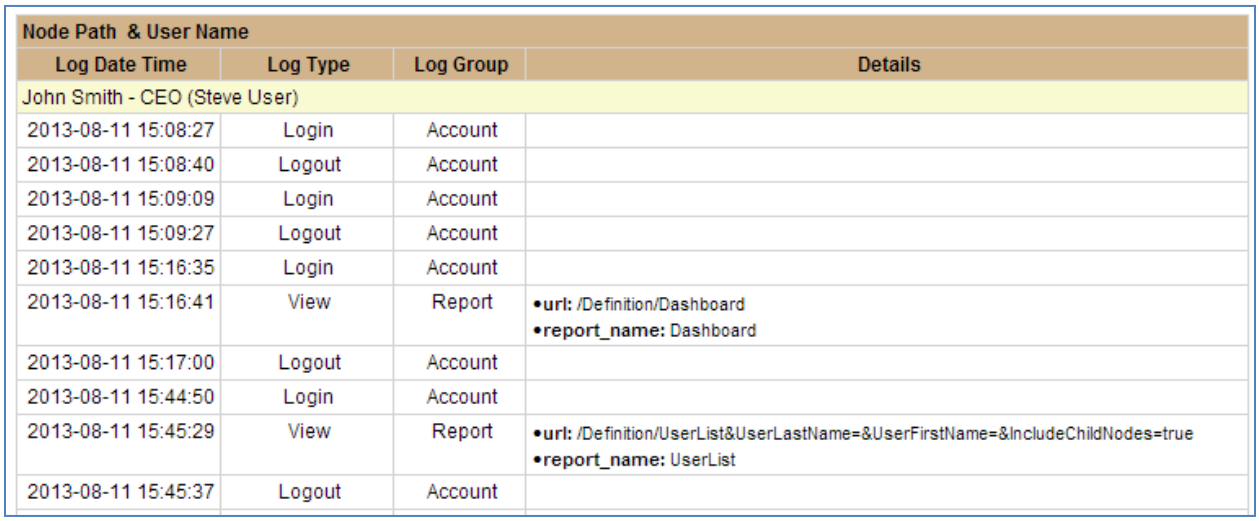


The report menu bar is displayed above the report. The functions include:

- First: Go to the first page in a multiple page report.
- Prev: Go back one page in a multiple page report.
- Next: Go forward one page in a multiple page report.
- Go Back: If a drill through has been performed, go back to the parent report; if not, go back to the Report List.

Bundled Report: Audit

The Audit report displays eDocument Expert system activity over a specified period of time.



Node Path & User Name			
Log Date Time	**Log Type**	**Log Group**	**Details**
John Smith - CEO (Steve User)			
2013-08-11 15:08:27	Login	Account	
2013-08-11 15:08:40	Logout	Account	
2013-08-11 15:09:09	Login	Account	
2013-08-11 15:09:27	Logout	Account	
2013-08-11 15:16:35	Login	Account	
2013-08-11 15:16:41	View	Report	•**url:** /Definition/Dashboard •**report_name:** Dashboard
2013-08-11 15:17:00	Logout	Account	
2013-08-11 15:44:50	Login	Account	
2013-08-11 15:45:29	View	Report	•**url:** /Definition/UserList&UserLastName=&UserFirstName=&IncludeChildNodes=true •**report_name:** UserList
2013-08-11 15:45:37	Logout	Account	

Roles Subscribed: ReportUser

Parameters:

- Log Type: Select system activity log type(s) to include.
- Include Child Nodes: Place a checkbox in this box if you would like to view system activity by users at child nodes as well as the owner node.
- Message Name: Enter all or part of the message name. If left blank all messages will be displayed.
- Start Date: Enter the start of the date range to include for system activity audit.
- End Date: Enter the end of the date range to include for system activity audit.
- User Last Name: Enter all or part of the user's last name. If left blank all last names will be included.
- User First Name: Enter all or part of the user's first name. If left blank all first names will be included.

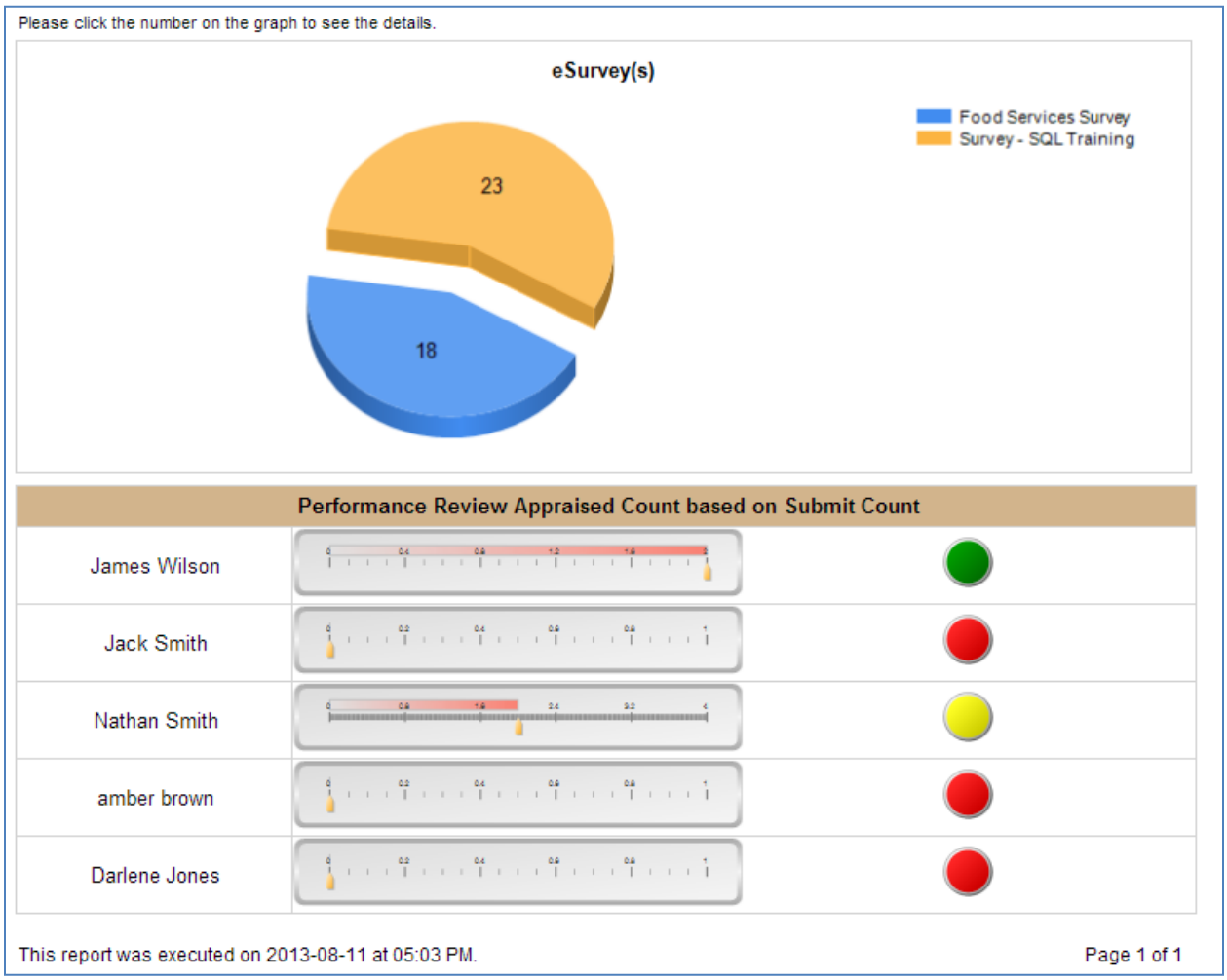
Fields:

- Node Path & User Name: Node path of the user's owner node and the user's name. The root displayed is the node at which the report is run.
- Log Date Time: Date and time system activity logged.
- Log Type: System activity log type. Log types include: Login, Logout, Report-View, Report-Export, Delivery-Email, Delivery-Ftp and Delivery-Shared Directory.
- Log Group: Log group system activity belongs to.
- Details: Details of the system activity log.

Drill Throughs: None

Bundled Report: Dashboard

The Dashboard report graphically presents: volume of eSurvey responses; ePerformance Review appraisals compared to submissions by appraiser.



Roles Subscribed: ReportUser

Parameters: None

Graphs:

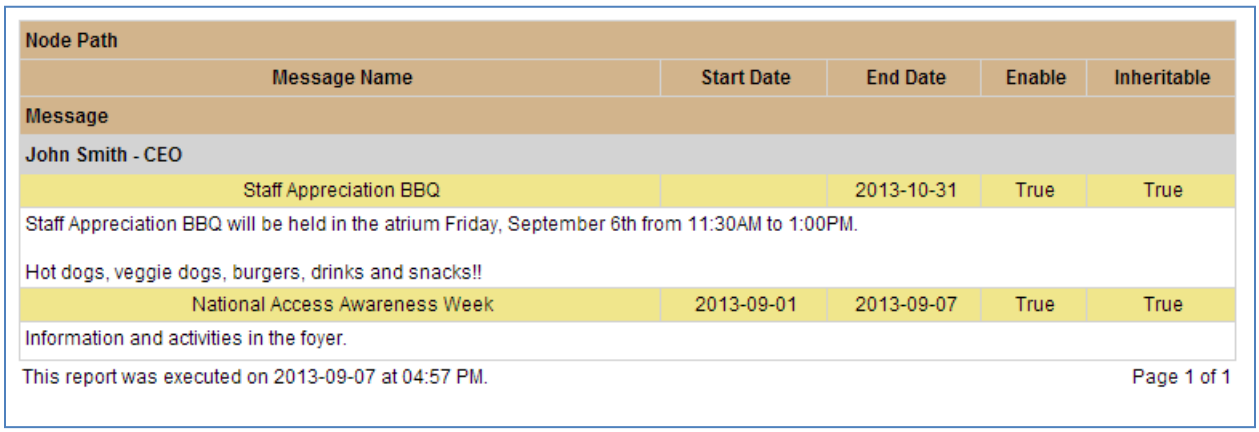
- eSurvey(s): Count of eSurvey responses by eSurvey.
- Performance Review Appraised Count based on Submit Count: Ratio of ePerformance Review appraisals completed to ePerformance Review self-appraisals submitted by appraisee.

Drill Throughs:

- Via the eSurvey(s) graph labels, table of response answers by DateTime of the response and IP Address.

Bundled Report: Message List

The Message List report displays a list of all existing Messages created at the owner node and, optionally, child nodes.



Node Path				
Message Name	**Start Date**	**End Date**	**Enable**	**Inheritable**
Message				
John Smith - CEO				
Staff Appreciation BBQ		2013-10-31	True	True
Staff Appreciation BBQ will be held in the atrium Friday, September 6th from 11:30AM to 1:00PM. Hot dogs, veggie dogs, burgers, drinks and snacks!!				
National Access Awareness Week	2013-09-01	2013-09-07	True	True
Information and activities in the foyer.				

This report was executed on 2013-09-07 at 04:57 PM. Page 1 of 1

Roles Subscribed: MessageAdmin

Parameters:

- Include Child Nodes: Place a checkbox in this box if you would like to view messages created at child nodes as well as the owner node.
- Message Name: Enter all or part of the message name. If left blank all messages will be displayed.

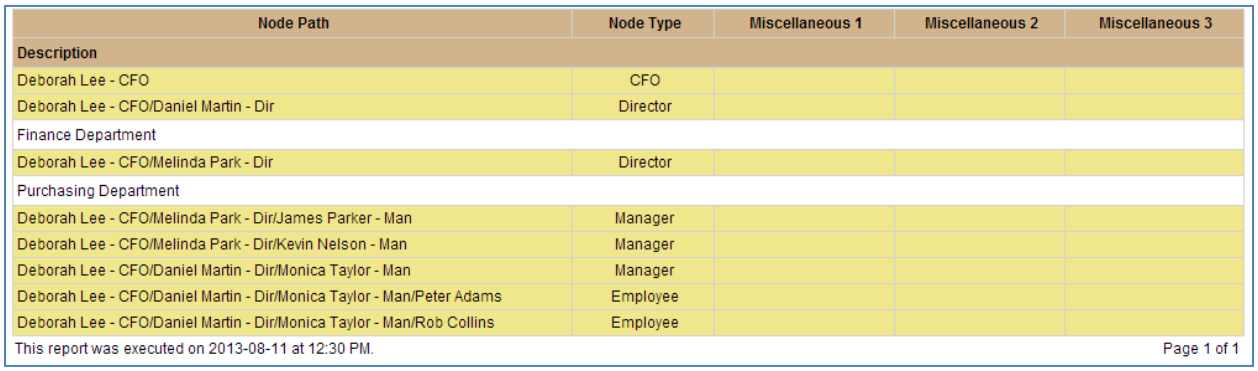
Fields:

- Node Path: Node path of the message's owner node. The root displayed is the node at which the report is run.
- Message Name: Name of the message.
- Start Date: Date from which the message will be displayed to users.
- End Date: Date to which the message will be displayed to users.
- Enable: Indicates if the message is currently enabled for users to see upon login.
- Inheritable: Indicates if the message is inheritable from owner node to child nodes.
- Message: Body text of the message.

Drill Throughs: None

Bundled Report: Node List

The Node List report displays a list of all existing nodes created at and below the selected node.



Node Path	Node Type	Miscellaneous 1	Miscellaneous 2	Miscellaneous 3
Description				
Deborah Lee - CFO	CFO			
Deborah Lee - CFO/Daniel Martin - Dir	Director			
Finance Department				
Deborah Lee - CFO/Melinda Park - Dir	Director			
Purchasing Department				
Deborah Lee - CFO/Melinda Park - Dir/James Parker - Man	Manager			
Deborah Lee - CFO/Melinda Park - Dir/Kevin Nelson - Man	Manager			
Deborah Lee - CFO/Daniel Martin - Dir/Monica Taylor - Man	Manager			
Deborah Lee - CFO/Daniel Martin - Dir/Monica Taylor - Man/Peter Adams	Employee			
Deborah Lee - CFO/Daniel Martin - Dir/Monica Taylor - Man/Rob Collins	Employee			

This report was executed on 2013-08-11 at 12:30 PM. Page 1 of 1

Roles Subscribed: ReportUser

Parameters:

- Include Child Nodes: Place a checkbox in this box if you would like to view child nodes as well as the owner node.
- Node Name: Enter all or part of the node name. If left blank all nodes will be displayed.

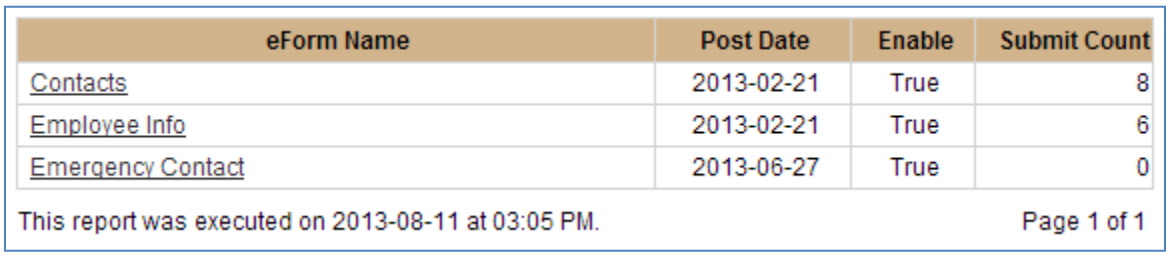
Fields:

- Node Path: Node path with the node from which the report is run as the root.
- Message Name: Type of the node (e.g. corporate title, department, etc).
- Miscellaneous 1: Miscellaneous text field one.
- Miscellaneous 2: Miscellaneous text field two.
- Miscellaneous 3: Miscellaneous text field three.
- Description: Description of the node.

Drill Throughs: None

Bundled Report: Posted eForm Summary

The Posted eForm Summary report displays a list of posted eForms and provides the drill through option to view response answers for each eForm.



eForm Name	Post Date	Enable	Submit Count
Contacts	2013-02-21	True	8
Employee Info	2013-02-21	True	6
Emergency Contact	2013-06-27	True	0

This report was executed on 2013-08-11 at 03:05 PM. Page 1 of 1

Roles Subscribed: eFormAdmin

Parameters:

- Include Child Nodes: Place a checkbox in this box if you would like to include eForm responses at child nodes as well as the owner node.
- eForm Name: Enter all or part of the eForm name. If left blank all eForms will be displayed.

Fields:

- eForm Name: Name of the eForm.
- Post Date: Date the eForm was last moved from development to production.
- Enable: Indicates if the eForm is enabled for eForm users to view and complete.
- Submit Count: Number of responses submitted.

Drill Throughs:

- Table of response answers by Node Path.
- eForm response for specific node.

Bundled Report: Posted ePerformance Review Summary

The Posted Performance Review Summary report displays a list of posted ePerformance Reviews and provides the drill through option to view submitted ePerformance Review appraisals.

ePerformance Review Name	Post Date	Enable	Appraise Count	Submit Count
2012 Performance Review	2013-06-11	True	4	9

This report was executed on 2013-08-11 at 04:13 PM. Page 1 of 1

Roles Subscribed: ePerformanceAdmin, ePerformanceAppraiser.

Parameters:

- ePerformance Review Name: Enter all or part of the ePerformance Review name. If left blank all ePerformance Reviews will be displayed.

Fields:

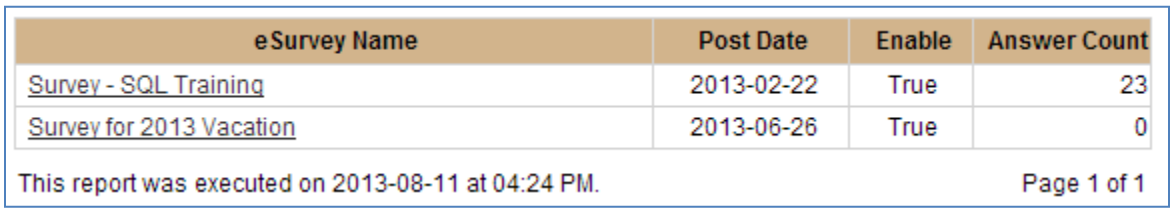
- ePerformance Review Name: Name of the ePerformance Review.
- Post Date: Date the ePerformance Review was last moved from development to production.
- Enable: Indicates if the ePerformance Review is enabled so that ePerformance Review appraisals can be completed.
- Appraise Count: Number of ePerformance Review self-appraisal submissions that have been appraised by a manager.
- Submit Count: Number of ePerformance Review self-appraisals that have been submitted.

Drill Throughs:

- Table of ePerformance Review submission details by Node Path.
- ePerformance Review submission and appraisal responses for specific appraisee.

Bundled Report: eSurvey Summary

The Posted eSurvey Summary report displays a list of posted eSurveys and provides the drill through option to view response answers for each eSurvey.



eSurvey Name	Post Date	Enable	Answer Count
Survey - SQL Training	2013-02-22	True	23
Survey for 2013 Vacation	2013-06-26	True	0

This report was executed on 2013-08-11 at 04:24 PM. Page 1 of 1

Roles Subscribed: eSurveyAdmin

Parameters:

- Include Child Nodes: Place a checkbox in this box if you would like to include eSurvey responses at child nodes as well as the owner node.
- eSurvey Name: Enter all or part of the eSurvey name. If left blank all eSurveys will be displayed.

Fields:

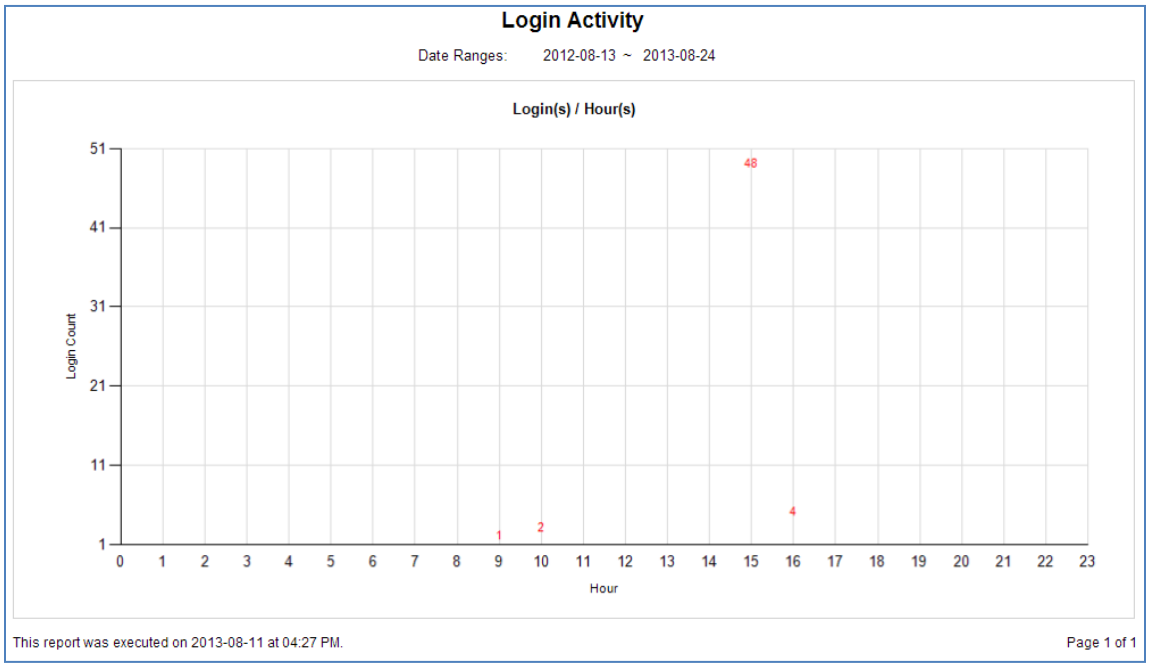
- eSurvey Name: Name of the ePerformance Review.
- Post Date: Date the eSurvey was last moved from development to production.
- Enable: Indicates if the eSurvey is enabled so that eSurvey users can email survey requests.
- Answer Count: Number of eSurvey responses that have been submitted.

Drill Throughs:

- Table of response answers by DateTime of the response and IP Address.

Bundled Report: System-Login

The System-Login report graphically displays login activity by hour over a specified time range.



Roles Subscribed: SystemAdmin

Parameters:

- Start Date: Enter the start of the date range to include for login activity.
- End Date: Enter the end of the date range to include for login activity.

Axes:

- Login Count: Number of logins.
- Hour: Hour of login.

Drill Throughs: None

Bundled Report: System-Report Execution History

The System-Report Execution History report displays a list of reports executions over a specified period of time.

Name	Time Data Retrieval	Time Start	Time Processing	Format
Dashboard	407	2013-08-05 18:27:52	99	HTML4.0
Answered-eSurveys-Detail-Matrix	260	2013-08-05 18:28:24	92	HTML4.0
Dashboard	383	2013-08-05 18:28:29	7	HTML4.0
Dashboard	158	2013-08-05 22:48:29	7	HTML4.0

This report was executed on 2013-08-11 at 04:35 PM. Page 1 of 1

Roles Subscribed: SystemAdmin

Parameters:

- Start Date: Enter the start of the date range to include for report execution activity.
- End Date: Enter the end of the date range to include for report execution activity.
- Time Data Retrieval (ms) >=: Enter minimum report execution time to include. If left blank all report executions will be included.
- Report Name: Enter all or part of the report name. If left blank all reports will be included.

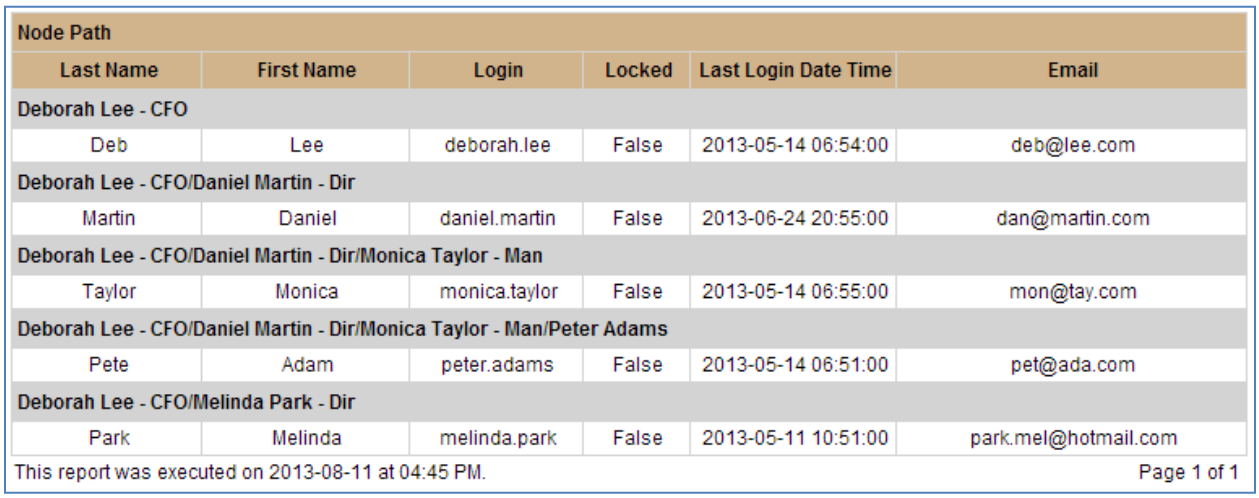
Fields:

- Name: Name of the report.
- Time Data Retrieval: Data retrieval time in milliseconds.
- Time Start: Date and time the report was run.
- Time Processing: Total report execution time in milliseconds.
- Format: Output format for report execution.

Drill Throughs: None

Bundled Report: User List

The User List report displays a list of all users created at the owner node and, optionally, child nodes.



Node Path					
Last Name	**First Name**	**Login**	**Locked**	**Last Login Date Time**	**Email**
Deborah Lee - CFO					
Deb	Lee	deborah.lee	False	2013-05-14 06:54:00	deb@lee.com
Deborah Lee - CFO/Daniel Martin - Dir					
Martin	Daniel	daniel.martin	False	2013-06-24 20:55:00	dan@martin.com
Deborah Lee - CFO/Daniel Martin - Dir/Monica Taylor - Man					
Taylor	Monica	monica.taylor	False	2013-05-14 06:55:00	mon@tay.com
Deborah Lee - CFO/Daniel Martin - Dir/Monica Taylor - Man/Peter Adams					
Pete	Adam	peter.adams	False	2013-05-14 06:51:00	pet@ada.com
Deborah Lee - CFO/Melinda Park - Dir					
Park	Melinda	melinda.park	False	2013-05-11 10:51:00	park.mel@hotmail.com

This report was executed on 2013-08-11 at 04:45 PM. Page 1 of 1

Roles Subscribed: ReportUser

Parameters:

- User Last Name: Enter all or part of the user's last name. If left blank all last names will be included.
- User First Name: Enter all or part of the user's first name. If left blank all first names will be included.
- Include Child Nodes: Place a checkbox in this box if you would like to view messages created at child nodes as well as the owner node.

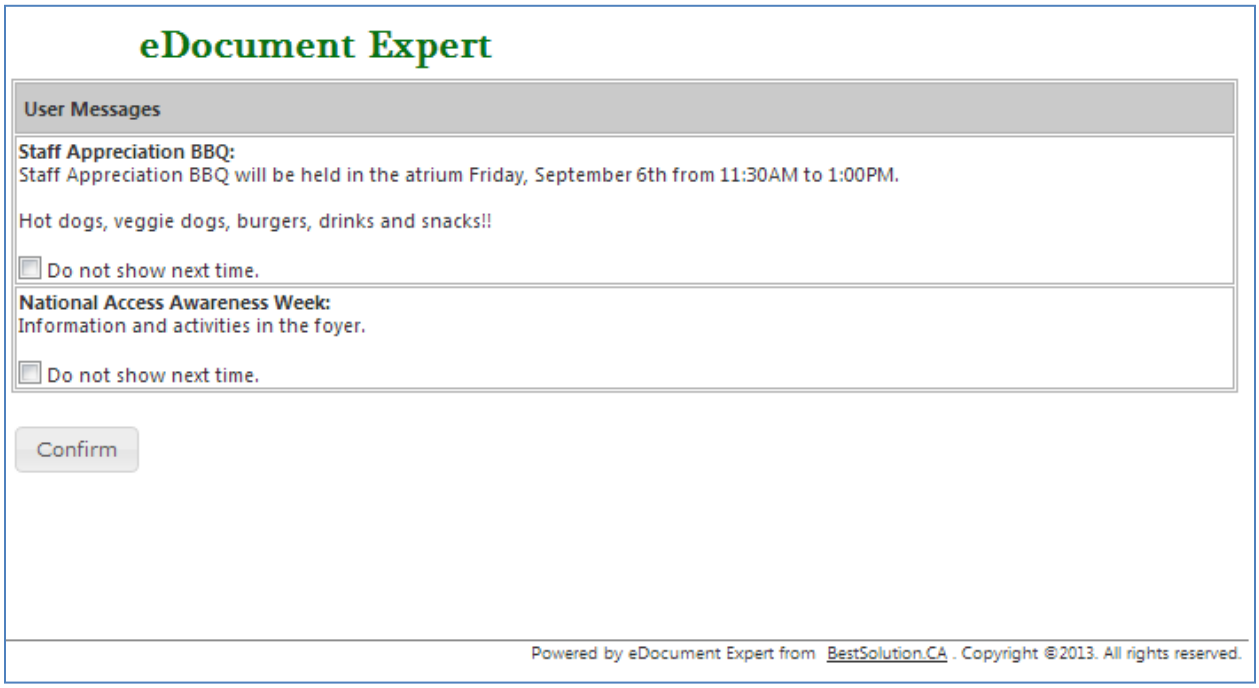
Fields:

- Node Path: Node path of the user's owner node. The root displayed is the node at which the report is run.
- Last Name: Last name of the user.
- First Name: First name of the user.
- Login: Login name of the user.
- Locked: Indicates the user's account is locked. If checked the user will not be able to login.
- Last Login Date Time:
- Email: Email of the user.

Drill Throughs: None

Chapter 8
Messages

eDocument Expert enables the distribution of messages at the organizational, departmental and individualized level. Messages can be created at any specific node, with the option to make it inheritable to child nodes. Users at included nodes will be presented the message upon log in.


eDocument Expert
User Messages
Staff Appreciation BBQ:
Staff Appreciation BBQ will be held in the atrium Friday, September 6th from 11:30AM to 1:00PM.
Hot dogs, veggie dogs, burgers, drinks and snacks!!
Do not show next time.
National Access Awareness Week:
Information and activities in the foyer.
Do not show next time.
Confirm
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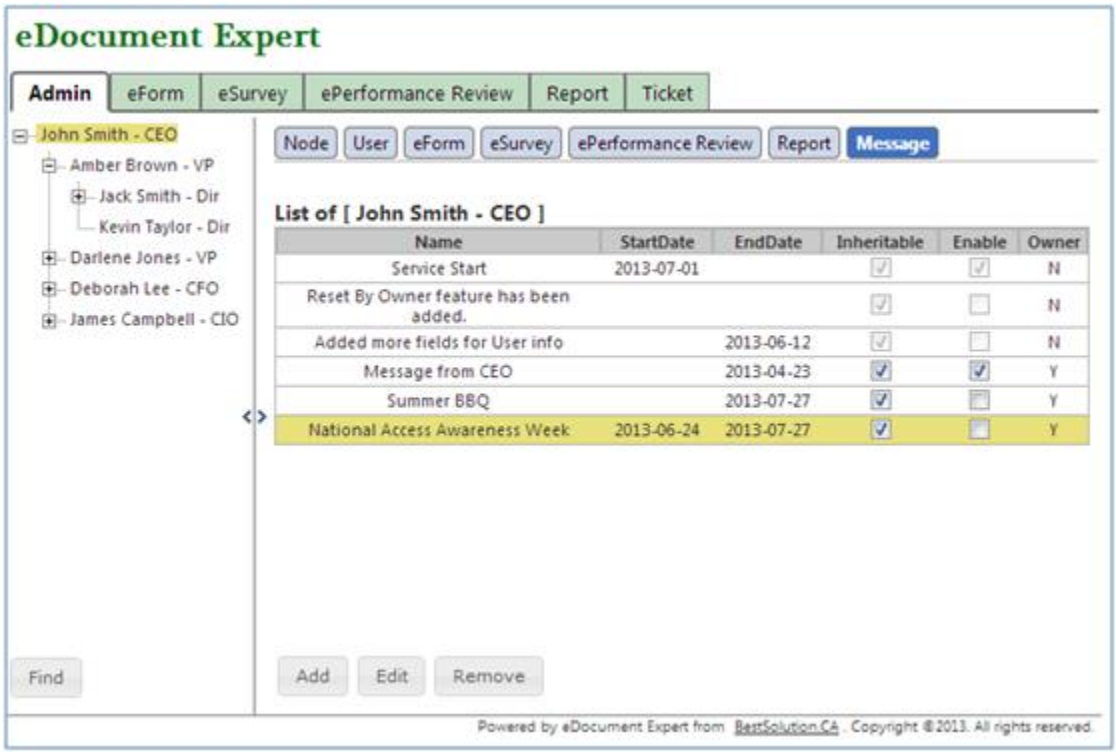
Managing Messages

The Admin-Message sub-section of eDocument Explorer allows you to add, copy, edit, remove and post a message. To manage messages you must be assigned the MessageAdmin role.



The Message List shows all messages available at a selected node. The information provided for each message in the list includes:

- **Name** - Name of the message
- **StartDate** - Date from which the message will be displayed to users.
- **EndDate** - Date to which the message will be displayed to users.
- **Inheritable** - Indicates if the message is inheritable from owner node to child nodes. If checked, message will be displayed upon login to users at the owner node and all child nodes under the owner node. If unchecked the message will only be displayed to users at the owner node.
- **Enable** - Indicates if the message is enabled for users to see upon login.
- **Owner** - Indicates if the current node is the owner of the message. The owner is the node at which the message was first created. The message can be modified only at the owner node.

The following functions can be accessed at the bottom of the Message List:

- **Add** - Add a new message.
- **Edit** - Edit an existing message.
- **Remove** - Remove a message.

How to Add a New Message

1. Navigate to the Admin-Message sub-section in the browser window.
2. In the Node Explorer, select the node at which you wish to add the message. The selected node will be the owner of the message ("owner node"). The owner node and the Inheritable status determine which users will see the message upon login.
3. Click Add.
4. Enter the Name, Dates and Description. The first Date field is the date from which the message will be displayed to users. The second Date field is the date to which the message will be displayed to users. The date range can be open ended.
5. Click Submit. You will be returned to the Message List.
6. If you wish the message to be displayed to users at all child nodes as well as the owner node then place a checkmark in the Inheritable box. If not checked, the message will only be displayed to users at the owner node.
7. Place a checkmark in the Enable box so that the message will be displayed to users upon login within the entered date range.

How to Edit an Existing Message

1. Navigate to the Admin-Message sub-section in the browser window.
2. In the Node Explorer, select the owner node of the message you wish to edit.
3. From the Message List, select the message to edit.
4. Edit fields as desired.
5. Click Submit. You will be returned to the Message List. The edited message will be displayed to users upon login.

How to Remove a Message

1. Navigate to the Admin- Message sub-section in the browser window.
2. In the Node Explorer, select the owner node of the message you wish to remove.
3. From the Message List, select the message to remove.
4. Click Remove. Once this step is completed, the message will be deleted.
5. Click Submit to confirm. You will be returned to the Message List.

Chapter 9
Tickets

The Ticket section provides a means to report issues and submit change requests to the eDocument Expert team.

The Ticket List shows all Tickets created at a selected node. The information provided for each ticket in the list includes:

- **Name** - Name of the ticket.
- **Category** - Issue, Service Order, or Purchase Order.
- **Status** - Open, Reopen, Cancel, Processing, or Close.
- **Created** - Date the ticket was first created.
- **Updated** - Date the ticket was last updated.

The following functions can be accessed at the bottom of the Ticket List:

- **Add** - Add a new ticket.
- **View** - View a ticket; can add a comment or change the status.
- **Edit** - Edit an existing ticket.
- **Remove** - Remove a ticket.

How to Add a Ticket

To add a ticket you must have the TicketUser role.

1. Navigate to Ticket section in the browser window.
2. In the Node Explorer, select the node at which you wish to add the ticket (the "owner node").
3. Click the Add button.
4. Enter the Name, Category and Description. Category options include: Issue, Service Order and Purchase Order.
5. If you want to include a file click Choose File and select the file from your folder directory. Only one file is allowed and it cannot exceed 5MB in size.
6. Click the Submit button. A new ticket is created. You will be returned to the Ticket List.

How to Edit a Ticket

To edit a ticket you must have the TicketUser role and you must have created the ticket.

1. Navigate to Ticket section in the browser window.
2. In the Node Explorer, select the owner node of the ticket you wish to edit.
3. Click the Edit button.
4. Edit fields as desired.

5. Click the Submit button. The ticket information is updated. You will be returned to the Ticket List.

How to View a Ticket and Add a Comment

To view a ticket and add a comment you must have either the TicketUser or TicketAdmin role.

1. Navigate to ticket section in the browser window.
2. In the Node Explorer, select the owner node of the ticket you wish to view.
3. Click the View button.
4. Click the Add Comment button.
5. Enter comment text. If you wish to notify the user who created ticket, place a checkmark in the corresponding box.
6. Click the Submit button. If you wish to delete the comment click Delete.
7. To exit, click the Go Back to List button.

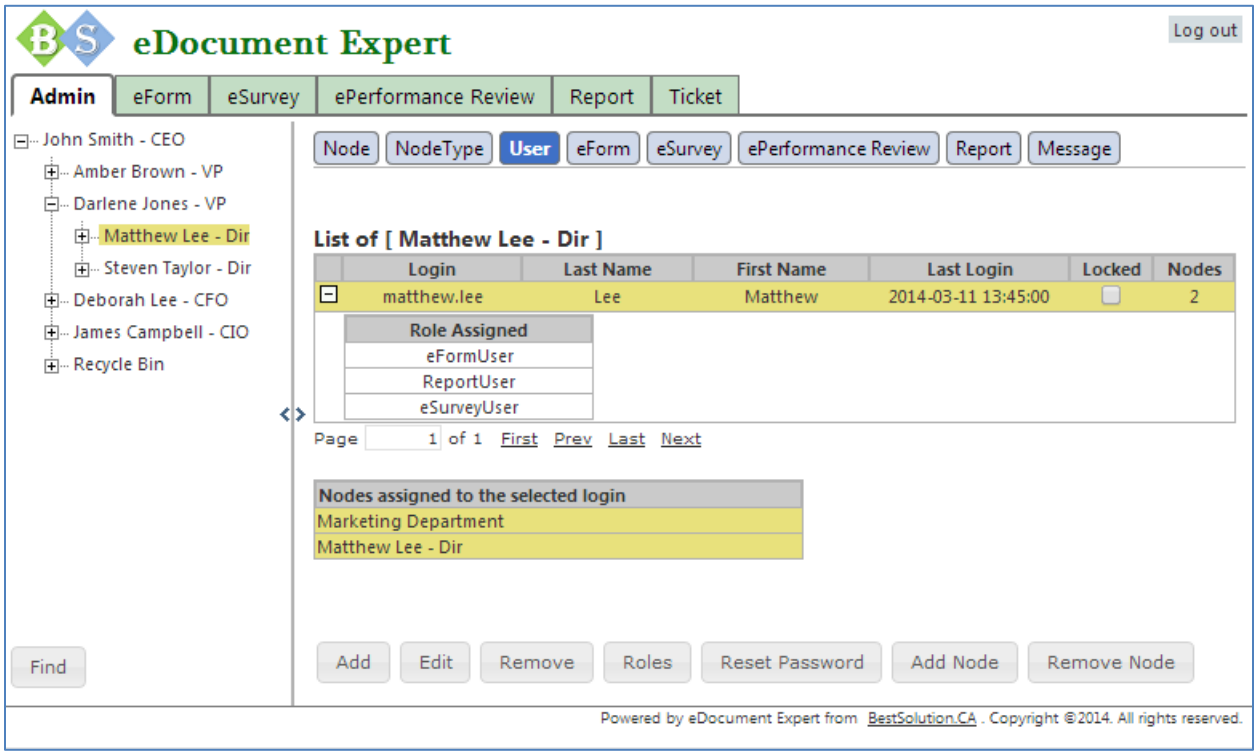
How to Change a Ticket Status

To change a ticket status you must have TicketAdmin.

1. Navigate to Ticket section in the browser window.
2. In the Node Explorer, select the owner node of the ticket you wish to change the status of.
3. Click View button.
4. Click Change Status button.
5. Select new status: Open, Reopen, Cancel, Processing or Close.
6. Click the Submit button.
7. To exit, click the Go Back to List button.

Chapter 10
Managing Users

The Admin-User sub-section of eDocument Explorer allows you to add, edit and remove users; assign roles to users; and reset user passwords. To manage users you must be assigned the UserAdmin role.



The User List shows all users created at a selected node. The information provided for each user in the list includes:

- **Login** - Login name of the user.
- **Last Name** - Last name of the user.
- **First Name** - First name of the user.
- **Last Login** - Date the user last logged in to the eDocument Expert application.
- **Locked** - Indicates the user's account is locked. If checked the user will not be able to login.
- **Nodes** - Number of nodes that are assigned to the user.
- **Roles** - Roles assigned to the user. Click the plus sign next to the Login name to see the list of roles assigned.
- **Nodes assigned to the selected login** - Nodes assigned to the user. Click the user from the list to see list of nodes assigned.

The following functions can be accessed at the bottom of the User List:

- **Add** - Add a new user.

- **Edit** - Edit user information.
- **Remove** - Remove a user.
- **Roles** - Assign roles to a user or revoke roles from a user.
- **Reset Password** - Reset a user's password.
- **Add Node** - Assign an additional node to the user.
- **Remove Node** - Remove an assigned node from the user. This function is only available if the user has more than one node assigned and a node is selected from the list.

How to Add a User

1. Navigate to Admin-User sub-section in the browser window.
2. In the Node Explorer, select the node at which you wish to add the user (the "user's node"). The user will have permission to view responses from all child nodes under the user's node.
3. Click the Add button.
4. Complete the fields. Login, Last Name, First Name and Email are required. Email must adhere to email standard, e.g. local@domain.xyz.
5. Enter and confirm the password. The password length range is 6-20 characters.
6. Click the Add button. The user is now created and can login with the provided credentials. You will be returned to the User List.

How to Edit User Information

1. Navigate to Admin-User sub-section in the browser window.
2. In the Node Explorer, select one of the user's node.
3. Select the user whose information you wish to edit.
4. Click the Edit button.
5. Edit fields as desired.
6. Click the Submit button. The user's information is updated. You will be returned to the User List

How to Remove a User

1. Navigate to Admin>User sub-menu.
2. In the Node Explorer, select one of the user's node.
3. Select the user you wish to remove.
4. Click the Remove button.
5. Click the Submit button to confirm. The user is deleted and will not be able to login. You will be returned to the User List.

How to Lock/Unlock a User Account

1. Navigate to Admin-User sub-section in the browser window.
2. In the Node Explorer, select one of the user's node.
3. Select the user whose account you wish to lock.
4. Click the Edit button
5. Place a checkmark in the Locked field.
6. Click Submit. The user will not be able to login until the account is unlocked.
7. To unlock, repeat the above steps except remove the checkmark.

How to Manage User Roles

1. Navigate to Admin-User sub-section.
2. In the Node Explorer, select one of the user's node.
3. Select the user you wish to assign roles to and/or revoke roles from.
4. Click the Roles button.
5. Place a checkmark beside each role you wish to assign to the user.
6. Remove a checkmark from each role you wish to revoke from the user.
7. Click the Submit button. The user's roles will be updated. You will be returned to the User List.

User Roles and Descriptions

Role	Description	Sections Enabled
eFormAdmin	Add, edit, remove, and post an eForm and reset a submitted eForm	Admin-eForm
eFormUser	Write, view and submit an eForm	eForm
UserAdmin	Add, edit, and remove an user and assign roles to a selected user	Admin-User
NodeAdmin	Add, edit, remove a node from a node hierarchy	Admin-Node
NodeTypeAdmin	Add, edit, remove any node type	Admin-Node
ReportAdmin	Add, edit, remove, and subscribe reports	Admin-Report
ReportUser	View reports	Report
ePerformanceAdmin	Add, edit, remove, and post an ePerformance Review	Admin-ePerformanceReview
ePerformanceAppraiser	Appraise and reject a submitted ePerformance Review	None. Note: ePerformanceAppraiser must also be given ePerformanceUser role to enable functionality.
ePerformanceUser	Write, view and submit an ePerformance Review	ePerformanceReview

MessageAdmin	Add, edit, and remove a system message	Admin>Message
eSurveyAdmin	Add, edit, remove, and post an eSurvey	Admin>eSurvey
eSurveyUser	View and send eSurvey	eSurvey
TicketAdmin	Change a ticket status and remove a ticket	Ticket
TicketUser	Add and edit a ticket	Ticket

Note: You can only assign roles that have also been assigned to you.

How to Add a Node to a User

1. Navigate to Admin>User sub-section.
2. In the Node Explorer, select the user's node.
3. Select the user.
4. Click the Add Node button.
5. A second instance of the Node Hierarchy will be opened in the main display area. Navigate this hierarchy and select the node to add to the user.
6. Click the Add button. The user now has the option to login under this node. You will be returned to the User List.

How to Remove an Assigned Node from a User

1. Navigate to Admin>User sub-section.
2. In the Node Explorer, select the user's node.
3. Select the user.
4. Select the node to remove from the ‘Nodes assigned to the selected login’ list.
5. Click the Remove Node button. Note: You will not be able to remove users from the node at which you logged in.
6. Click the Submit button to confirm. The user will no longer be able to login under this node. You will be returned to the User List.

How to Reset a User Password

1. Navigate to Admin>User sub-section.
2. In the Node Explorer, select the user's node.
3. Select the user.
4. Click the Reset Password button.
5. Enter and confirm new password. The password length range is 6-20 characters.
6. Click the Submit button. The user can login with the new password. You will be returned to the User List.